The Terry Fox Research Institute
L'Institut de recherche Terry Fox

TFRI RA-FRS User Guide (DRAFT)

Document Version 1.0

June 10, 2013

Document History

The following table contains a list of changes made to this document since it was originally released.

Table 1: Document History

Date	Document Version	Description of Change	Author
10-Jun-13	1.0	Draft document released.	TFRI

Glossary of Terms

The following table contains a list of acronyms used throughout this document.

Table 2: Glossary of Terms

Name/Acronym	Definition
BA	Budget Amendment
Financial Representative	The person responsible for inputting disbursements into the electronic system. Each PI listed must have an associated Financial Representative listed.
FRS	Financial Reporting System
PI	Any investigator receiving funds from the TFRI project. He/she may have such a designation as "Principal Investigator, Co-Investigator, Co-Principal Investigator, Co-PI, Co-I" etc. but in the electronic financial reporting system the role is referred to as "PI". Note that though account registration in the system is required for PIs, they are not likely to have any tasks associated with them. The Project Leader should also be listed if he/she is receiving funds, along with his/her associated Financial Representative.
Project Leader	Principal Applicant/Nominated Principal Investigator. Only one can be assigned.
Project	Within the RA-FRS, an RA is made up of projects. Each project has assigned Site/PIs
Project Manager	Must be designated. Only one can be assigned.
QER	Quarterly Expenditure Report
RA	Research Activity
RA-FRS	Research Activity Financial Reporting System
Research Activity	A record in the RA-FRS for a funded program or project
Research Report	Either a progress report, update report, quarterly report or annual report.
TFRI	Terry Fox Research Institute
TFRI RA-FRS	Terry Fox Research Institute Research Activity Financial Reporting System

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PART I: INTRODUCTION

Welcome to the Terry Fox Research Institute Research Activity Financial Reporting System (TFRI RA-FRS) User Guide. This guide describes the key processes and functions required to manage a TFRI funded research activity on TFRI's online reporting system and how to navigate the system.

1. System Overview

The RA-FRS is TFRI's budget and reporting system for funded research activities. It provides a web-based portal for Research Activity (RA) Research Reports, Tasks and Deliverables, Budget and Expenditure Reports. The application has the following functionalities:

- Develop RA budget
- Make budget amendments
- Reconcile payments and expenditures
- Record RA reporting timelines and deadlines
- Report financial and research progress

1.1. Roles and Permissions

This system supports a variety of roles, each with a specific set of permissions. System roles may not reflect the job titles of the individuals who are assigned these roles.

Table 3: Roles and Permissions

System Role	Permissions
Project Leader Project Manager	• Edit RA information such as site mappings, user assignments, etc. • Input leveraged funding and tasks and deliverables • Input and submit original budget for all projects • Prepare and submit budget amendments when required • Prepare and submit Research Reports • View/input and submit Quarterly Expenditure Reports for all projects • Approve reconciliation activities

System Role	Permissions
Institution Financial Representative	• View/input budget information for assigned Institution Site • Record and validate quarterly instalments • Prepare quarterly expenditure reports • Prepare Annual Sign-Off for assigned Institution Site-PI • View Research Reports, leveraged funding and tasks and deliverables
PI	• View/input budget information for permitted projects • View leveraged funding and tasks and deliverables • Prepare and submit Research Reports • Prepare Annual Sign-Off for assigned Institution Site-PI
TFRI Administration	• Open new Research Activity • View information and reports for all Research Activities • View administrative reports • Open Budget Amendments (as necessary) • Record payment instalments • Propose and approve reconciliation decisions • Approve and upload responses to Quarterly Executive Reports • Close completed Research Activities.

1.2. System Requirements

TFRI RA-FRS is fully functional using the current and at least two earlier versions of the following desktop browsers: Internet Explorer, Firefox, Google Chrome and Safari.

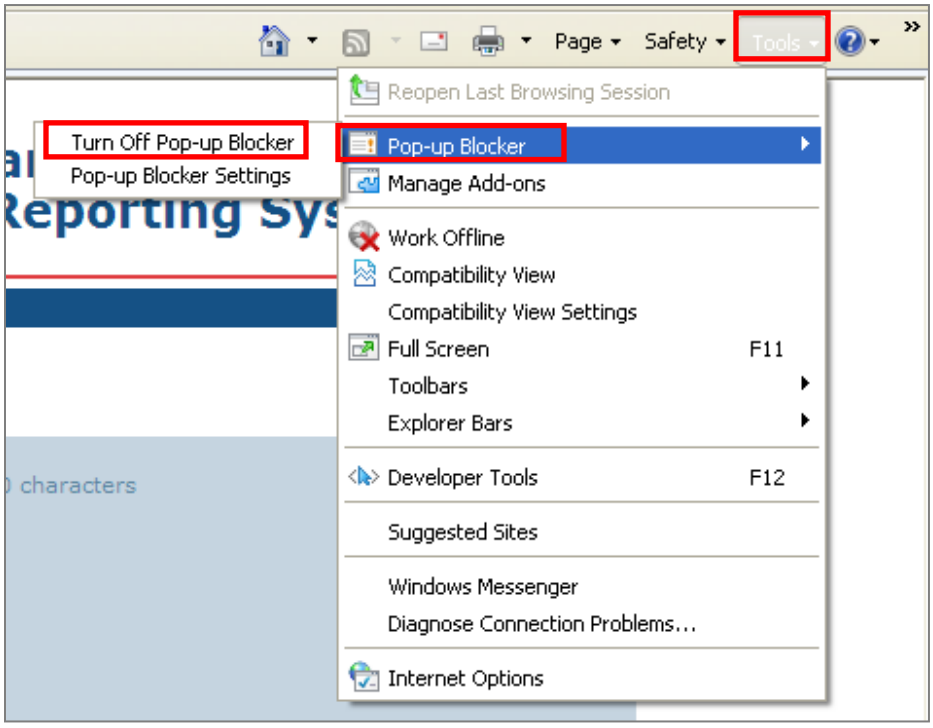
1.2.1. Browser Configuration

In order for all system functions to be available, users must ensure their web browsers are configured appropriately: Pop-up blockers must be disabled and security settings must allow for file downloads.

1.2.1.1. Disable Pop-Up Blocker

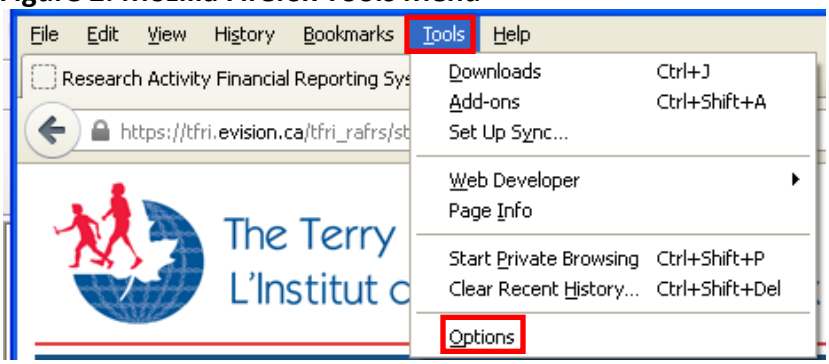
To disable the pop-up blocker on Internet Explorer go to the **Tools** menu, click **Pop-Up Blocker** and turn off the pop-up blocker.

Figure 1: Disabling Pop-Up Blocker in Internet Explorer



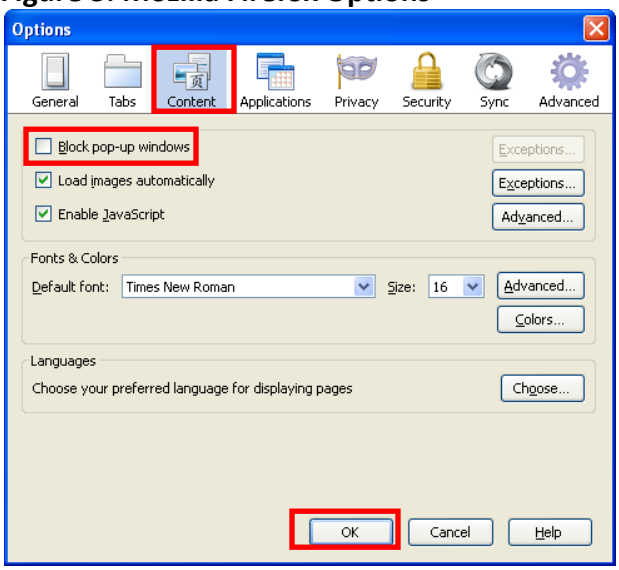
In Mozilla Firefox, go to the Tools menu and click **Options**.

Figure 2: Mozilla Firefox Tools Menu



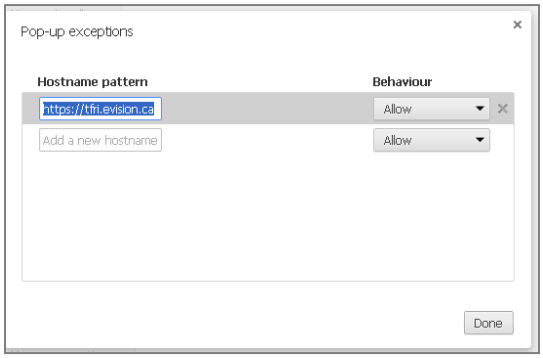
Select the **Content** tab and then uncheck the **Block pop-up windows** option

Figure 3: Mozilla Firefox Options



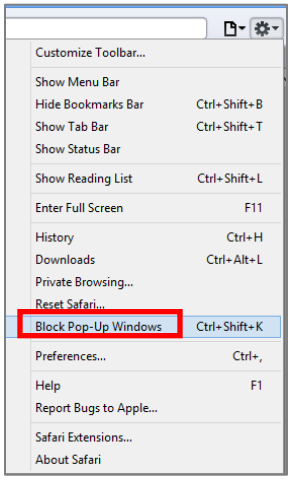
In Google Chrome, click the Chrome menu on the browser toolbar.
Select **Settings**.
Click **Show advanced settings**.
in the **Privacy** section, click the **Content settings** button.
In the **Pop-ups** section, click **Manage exceptions**.
Enter https://tfri.evision.ca and select **Allow** under **Behaviour**

Figure 4: Google Chrome Pop-up Exceptions Menu



In Safari, click the settings button and make sure **Block Pop-Up Windows** is unchecked

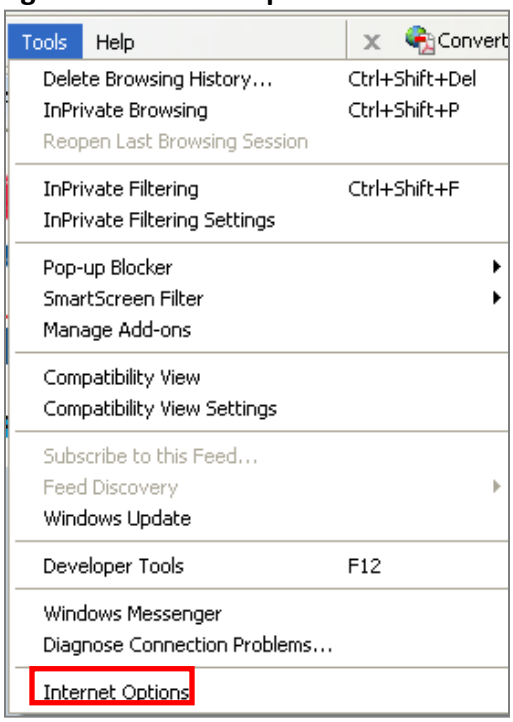
Figure 5: Safari Settings Drop-Down List



1.2.1.2. Adjust Security Parameters

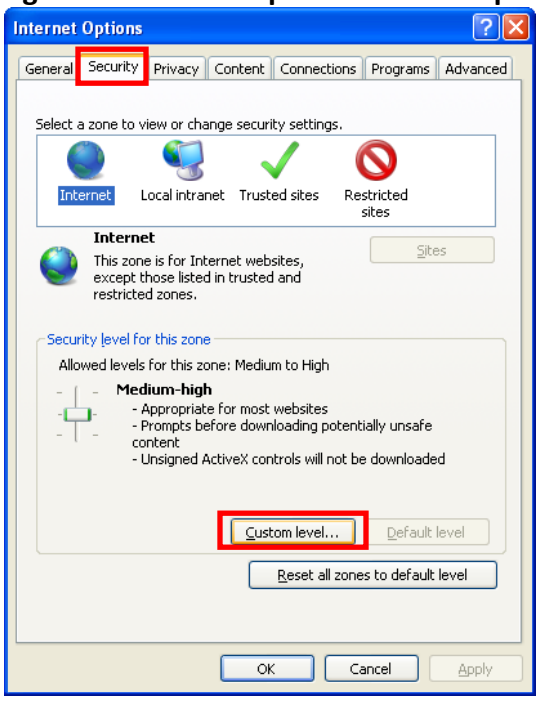
In Internet Explorer v. 8 there is a default security setting that blocks automatic prompting for file downloads. In order to prevent difficulties with file downloads, open the **Tools** menu and click **Internet Options**.

Figure 6: Internet Explorer Tools Menu



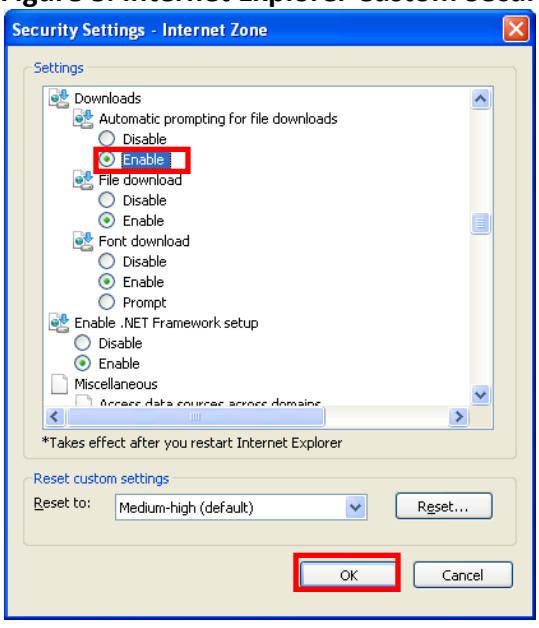
Select the **Security** tab and the button labeled **Custom Level**

Figure 7: Internet Explorer Internet Options



Click **Enable** under **Automatic prompting for file downloads**.

Figure 8: Internet Explorer Custom Security Settings



Note, the browser must be closed and re-opened before the change will take effect.

2. Navigate the System

2.1. Website URL

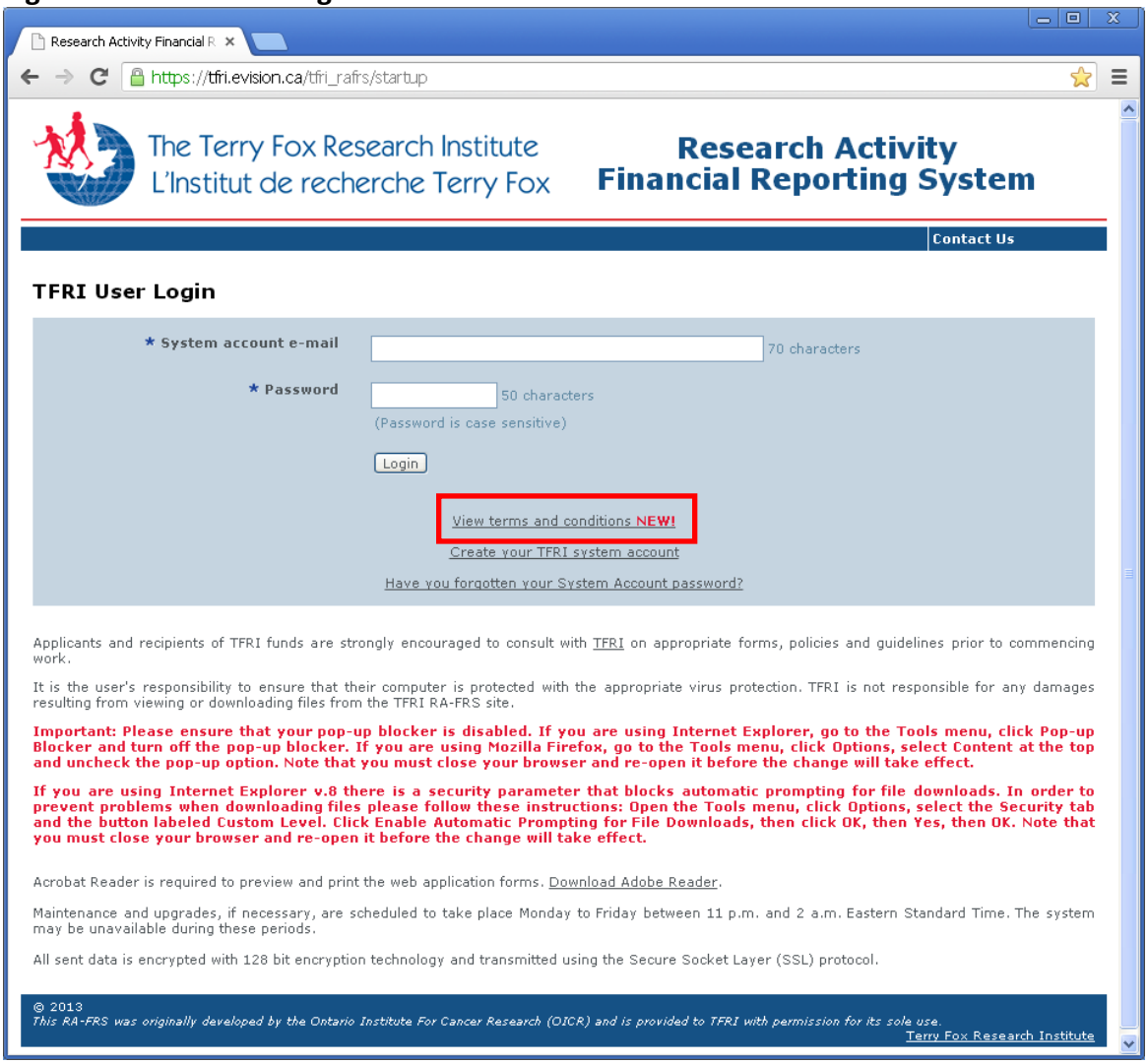
The TFRI RA-FRS can be accessed at the following URL:

https://tfri.evision.ca/tfri_rafrs/startup

2.2. Terms and Conditions

Prior to using the system, users are encouraged to read the system **Terms and Conditions**, indicated below.

Figure 9: TFRI RA-FRS Log in Screen


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
Contact Us
TFRI User Login
* System account e-mail
70 characters
* Password
50 characters
(Password is case sensitive)
Login
View terms and conditions NEW!
Create your TFRI system account
Have you forgotten your System Account password?
Applicants and recipients of TFRI funds are strongly encouraged to consult with TFRI on appropriate forms, policies and guidelines prior to commencing work.
It is the user's responsibility to ensure that their computer is protected with the appropriate virus protection. TFRI is not responsible for any damages resulting from viewing or downloading files from the TFRI RA-FRS site.
Important: Please ensure that your pop-up blocker is disabled. If you are using Internet Explorer, go to the Tools menu, click Pop-up Blocker and turn off the pop-up blocker. If you are using Mozilla Firefox, go to the Tools menu, click Options, select Content at the top and uncheck the pop-up option. Note that you must close your browser and re-open it before the change will take effect.
If you are using Internet Explorer v.8 there is a security parameter that blocks automatic prompting for file downloads. In order to prevent problems when downloading files please follow these instructions: Open the Tools menu, click Options, select the Security tab and the button labeled Custom Level. Click Enable Automatic Prompting for File Downloads, then click OK, then Yes, then OK. Note that you must close your browser and re-open it before the change will take effect.
Acrobat Reader is required to preview and print the web application forms. Download Adobe Reader.
Maintenance and upgrades, if necessary, are scheduled to take place Monday to Friday between 11 p.m. and 2 a.m. Eastern Standard Time. The system may be unavailable during these periods.
All sent data is encrypted with 128 bit encryption technology and transmitted using the Secure Socket Layer (SSL) protocol.
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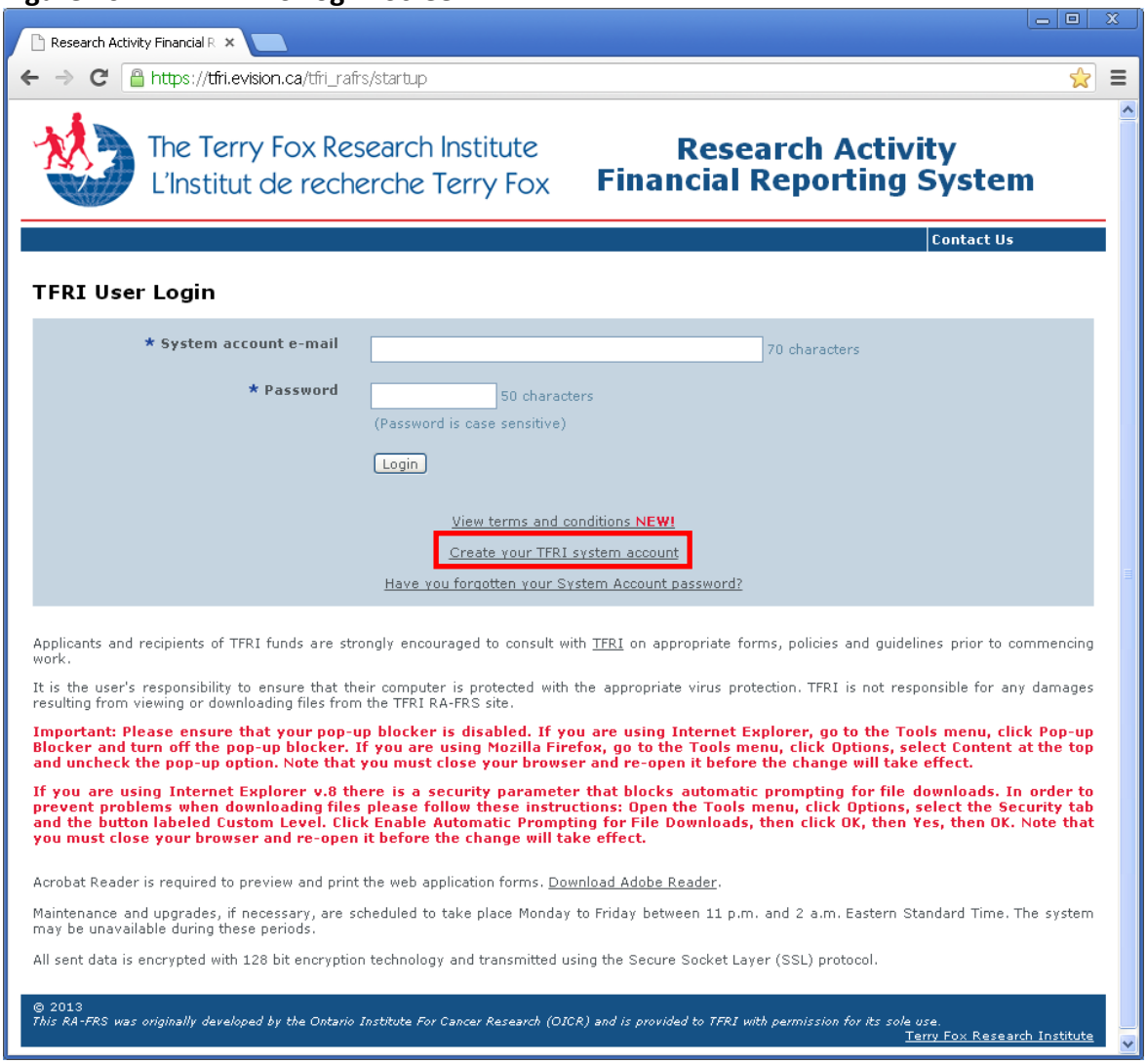
2.3. Who should have a system account?

Only certain people need access to TFRI RA-FRS. If you have questions about whether you should have access to the system, contact your Program/Project Manager or Project Leader.

2.4. Registration

To create an account, click **Create your TFRI system account** and follow the directions. For assistance with this process, contact the TFRI Help Desk at 604-675-8222, or via email at FRShelp@tfri.ca.

Figure 10: TFRI RA-FRS Log in Screen


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
Contact Us
TFRI User Login
* System account e-mail
70 characters
* Password
50 characters
(Password is case sensitive)
Login
View terms and conditions NEW!
Create your TFRI system account
Have you forgotten your System Account password?
Applicants and recipients of TFRI funds are strongly encouraged to consult with TFRI on appropriate forms, policies and guidelines prior to commencing work.
It is the user's responsibility to ensure that their computer is protected with the appropriate virus protection. TFRI is not responsible for any damages resulting from viewing or downloading files from the TFRI RA-FRS site.
Important: Please ensure that your pop-up blocker is disabled. If you are using Internet Explorer, go to the Tools menu, click Pop-up Blocker and turn off the pop-up blocker. If you are using Mozilla Firefox, go to the Tools menu, click Options, select Content at the top and uncheck the pop-up option. Note that you must close your browser and re-open it before the change will take effect.
If you are using Internet Explorer v.8 there is a security parameter that blocks automatic prompting for file downloads. In order to prevent problems when downloading files please follow these instructions: Open the Tools menu, click Options, select the Security tab and the button labeled Custom Level. Click Enable Automatic Prompting for File Downloads, then click OK, then Yes, then OK. Note that you must close your browser and re-open it before the change will take effect.
Acrobat Reader is required to preview and print the web application forms. Download Adobe Reader.
Maintenance and upgrades, if necessary, are scheduled to take place Monday to Friday between 11 p.m. and 2 a.m. Eastern Standard Time. The system may be unavailable during these periods.
All sent data is encrypted with 128 bit encryption technology and transmitted using the Secure Socket Layer (SSL) protocol.
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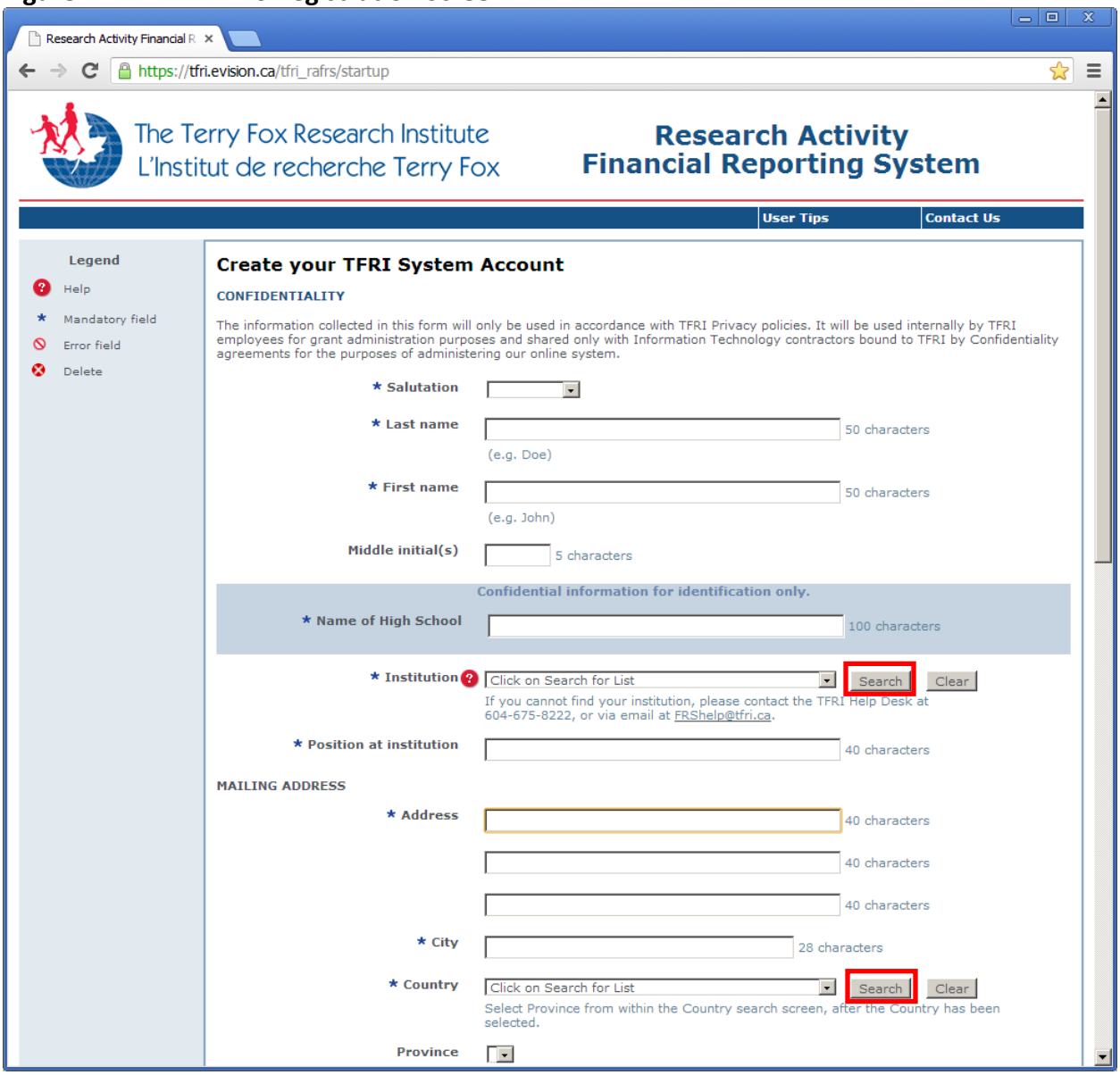
Mandatory fields in the online registration form are marked with an asterix (*).
The name of your high school is used as an identifier for password retrieval should you forget your password.

To select your Institution, click on the **Search** button beside **Institution**. If you cannot find your institution, please contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.

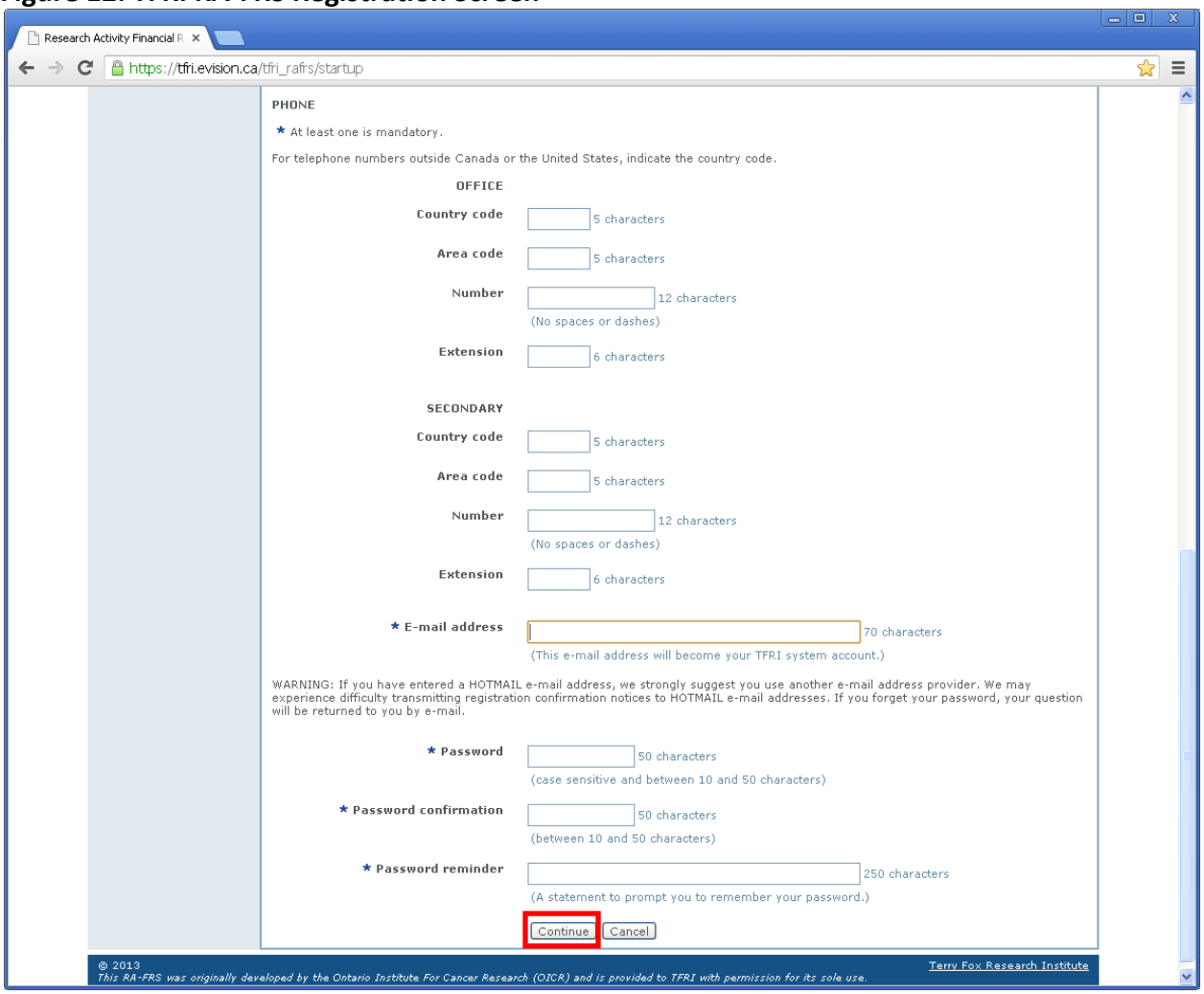
To select Country and Province, click on the **Search** button beside **Country**. Select your country and do not close the search window. If it is Canada, a list of provinces will immediately show. Select your province.

Figure 11: TFRI RA-FRS Registration Screen


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
User Tips
Contact Us
Legend
Help
Mandatory field
Error field
Delete
Create your TFRI System Account
CONFIDENTIALITY
The information collected in this form will only be used in accordance with TFRI Privacy policies. It will be used internally by TFRI employees for grant administration purposes and shared only with Information Technology contractors bound to TFRI by Confidentiality agreements for the purposes of administering our online system.
* Salutation
* Last name
50 characters
(e.g. Doe)
* First name
50 characters
(e.g. John)
Middle initial(s)
5 characters
Confidential information for identification only.
* Name of High School
100 characters
* Institution
Click on Search for List
Search
Clear
If you cannot find your institution, please contact the TFRI Help Desk at 604-675-8222, or via email at FRShelp@tfri.ca.
* Position at institution
40 characters
MAILING ADDRESS
* Address
40 characters
40 characters
40 characters
* City
28 characters
* Country
Click on Search for List
Search
Clear
Select Province from within the Country search screen, after the Country has been selected.
Province

Once you have filled out the online registration form, click **Continue** at bottom.

Figure 12: TFRI RA-FRS Registration Screen


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
PHONE
* At least one is mandatory.
For telephone numbers outside Canada or the United States, indicate the country code.
OFFICE
Country code
5 characters
Area code
5 characters
Number
12 characters
(No spaces or dashes)
Extension
6 characters
SECONDARY
Country code
5 characters
Area code
5 characters
Number
12 characters
(No spaces or dashes)
Extension
6 characters
* E-mail address
70 characters
(This e-mail address will become your TFRI system account.)
WARNING: If you have entered a HOTMAIL e-mail address, we strongly suggest you use another e-mail address provider. We may experience difficulty transmitting registration confirmation notices to HOTMAIL e-mail addresses. If you forget your password, your question will be returned to you by e-mail.
* Password
50 characters
(case sensitive and between 10 and 50 characters)
* Password confirmation
50 characters
(between 10 and 50 characters)
* Password reminder
250 characters
(A statement to prompt you to remember your password.)
Continue
Cancel
© 2013
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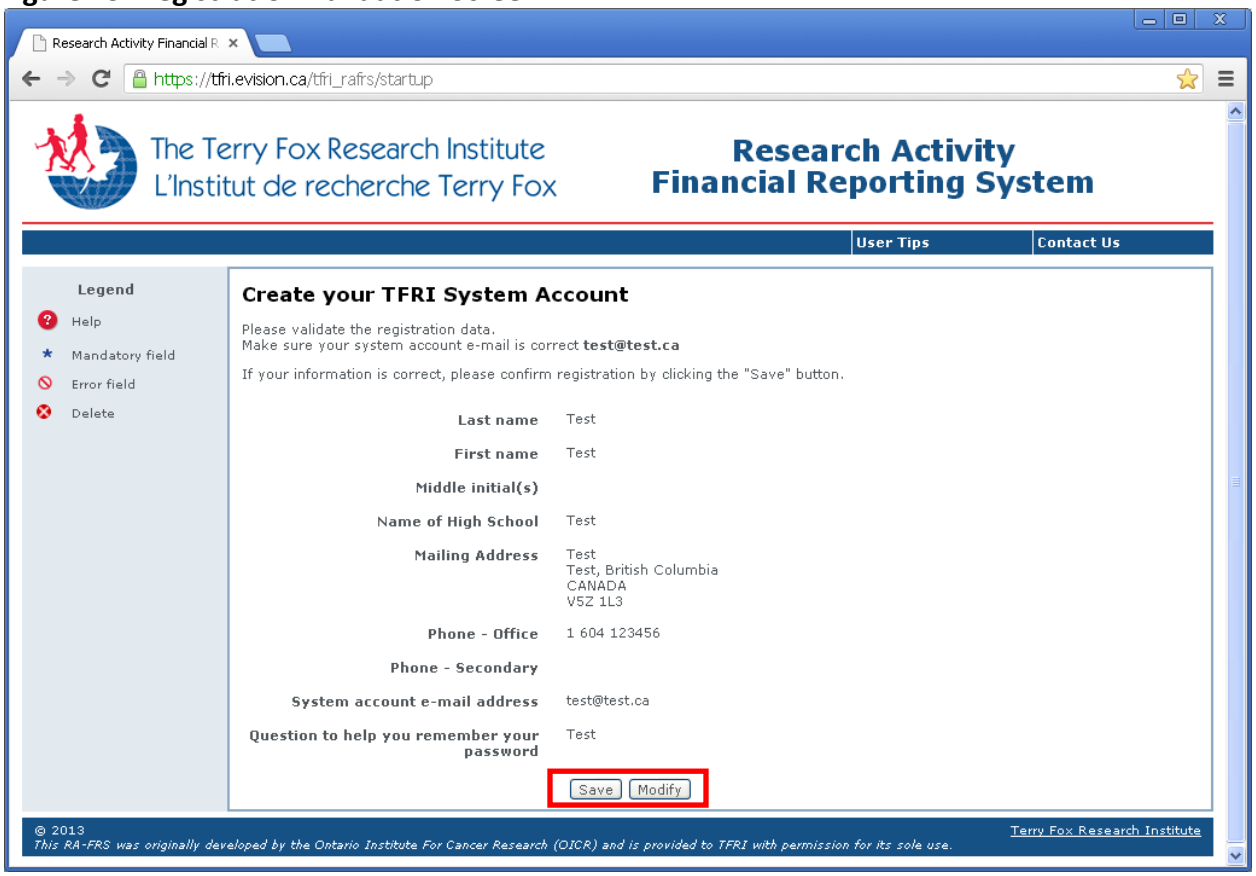
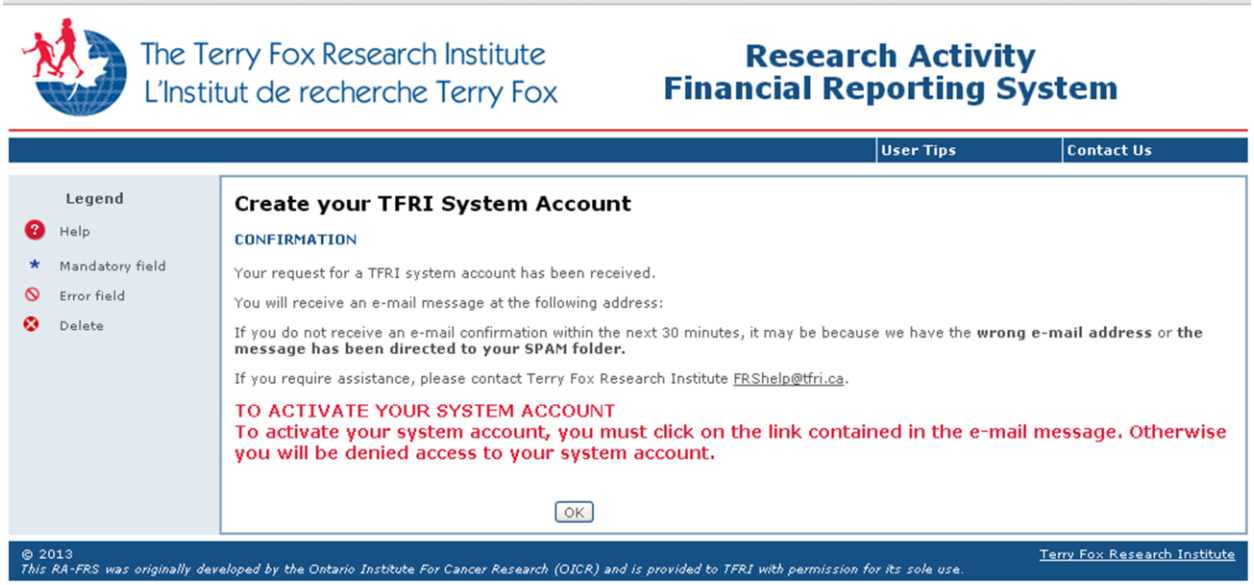
A summary screen will display showing the information you entered. If you wish to change anything, click **Modify.** Otherwise, click **Save**.

Figure 13: Registration Validation Screen



A confirmation screen will display and direct you to check your email for activation. If you do not receive an email from the TFRI system administrator (admin@evision.ca), you may have entered the wrong email address or the message can be found in your SPAM folder. If you require assistance, please contact TFRI at FRShelp@tfri.ca.

Figure 14: Registration Confirmation Screen


The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
User Tips
Contact Us
Legend
Help
Mandatory field
Error field
Delete
Create your TFRI System Account
CONFIRMATION
Your request for a TFRI system account has been received.
You will receive an e-mail message at the following address:
If you do not receive an e-mail confirmation within the next 30 minutes, it may be because we have the wrong e-mail address or the message has been directed to your SPAM folder.
If you require assistance, please contact Terry Fox Research Institute FRShelp@tfri.ca.
TO ACTIVATE YOUR SYSTEM ACCOUNT
To activate your system account, you must click on the link contained in the e-mail message. Otherwise you will be denied access to your system account.
OK
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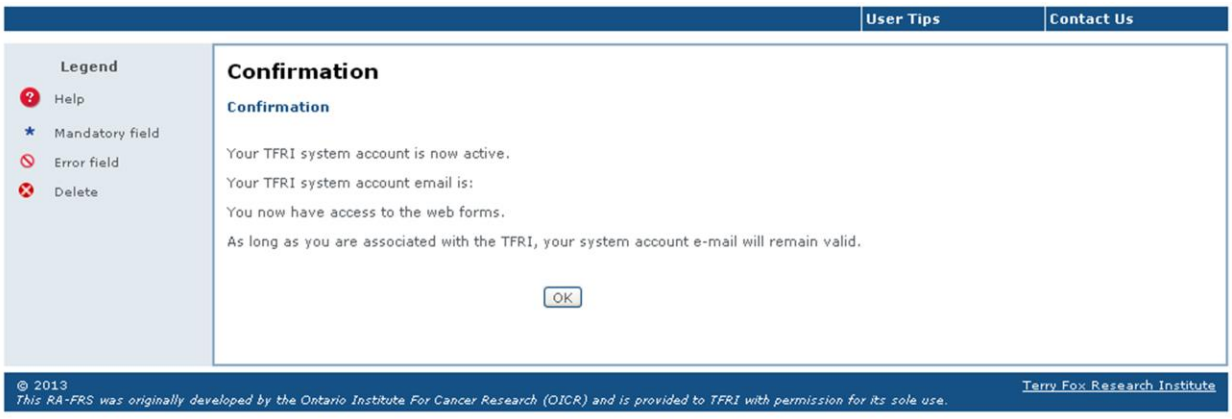
The email will provide a link that you must click in order to activate your account. If the link is not clickable, copy and paste it into your browser's address bar.

Once activated, a confirmation screen will display in your web browser

Figure 15: Registration Activation Screen


User Tips
Contact Us
Legend
Help
Mandatory field
Error field
Delete
Confirmation
Confirmation
Your TFRI system account is now active.
Your TFRI system account email is:
You now have access to the web forms.
As long as you are associated with the TFRI, your system account e-mail will remain valid.
OK
© 2013
This RA-FRS was originally developed by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
Terry Fox Research Institute

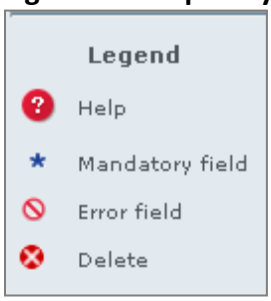
Another email will be sent by the system confirming that your account is now active. From this point forward, your email address will be your login ID. Please notify the Program/Project Manager or Project Leader for your project that you have registered. Once they add you to the

Research Activity (your project) in the system, you will be able to log in at https://tfri.evision.ca/tfri_rafrs/startup and use the system for your project.

2.5. Key Features

Once the Research Activity (RA) has been selected, you will see a list of helpful symbols on the left-hand side of your screen.

Figure 16: Helpful Symbols



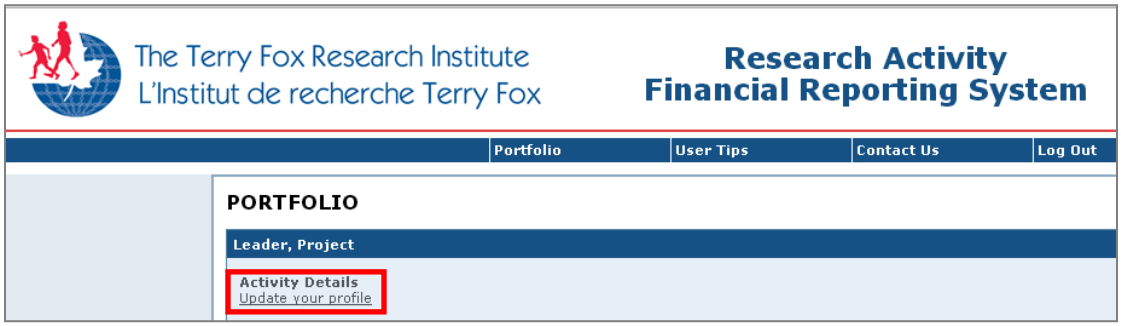
The **Help** icon indicates that more information is available about that part of the page. Clicking on the icon will open up a pop-up window with helpful text. For additional assistance, contact the TFRI Help Desk at 604-675-8222, or via email at FRShelp@tfri.ca.

An **asterisk** indicates that a particular field is mandatory. The **Error** symbol indicates that an entry is invalid. Finally, the **Delete** symbol indicates the user may delete a value.

2.6. Manage Your Account

The RA-FRS has some basic account management features. To access these features click on the **Update your profile** link located on the Portfolio page.

Figure 17: Update your profile



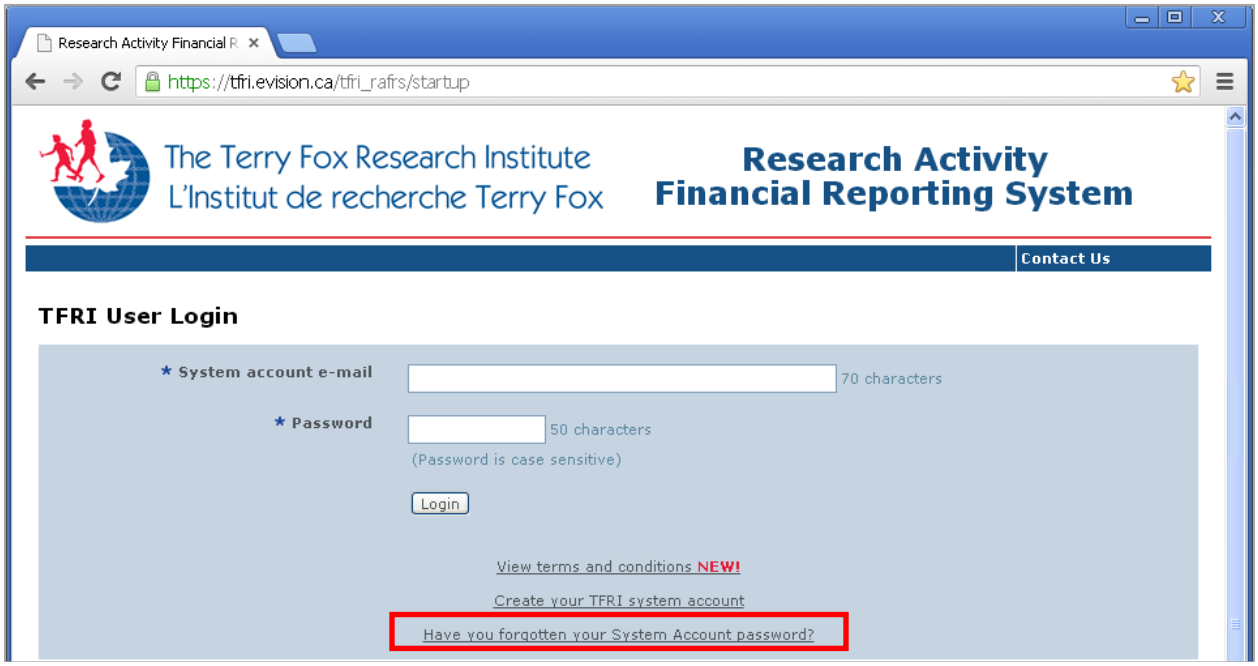
2.6.1. Update Your Profile

This page provides users with the ability to change account information and password. To change name or email address, contact the TFRI Help Desk at 604-675-8222, or via email at FRShelp@tfri.ca. When changing your password, do not forget to update your password reminder. Your password reminder will be sent to you if you use the "forgot your password" feature on the login screen.

2.6.2. Forgotten Password

In the event that you have forgotten your password, click the, **Have you forgotten your System Account password?** link on the login page https://tfri.evision.ca/tfri_rafrs/startup

Figure 18: Forgotten Password



Fill in the information that the system requests, then click **Search**.

Figure 19: Account and Password Retrieval

An email will be sent to you, with your password reminder. If you have entered incorrect information in the Search screen above, the email will indicate there has been a problem retrieving your information and you will be directed to contact TFRI.

If you still cannot recall your password after receiving a password reminder, please contact TFRI at 604-675-8222, or via email at FRShelp@tfri.ca so that your password may be reset.

3. TFRI RA-FRS Budget and Reporting Process

In order to understand how the RA-FRS system is to be used, it is best to review the TFRI budget and reporting process (see **Figure 20**). The process involves the following types of activities:

- RA Set-Up Activities
- Quarterly Activities
- Annual Activities
- Other Activities

The following sections are intended to provide users with an overview of the RA-FRS budget and reporting process. Detailed instructions are covered in Parts II through IV of this guide.

3.1. RA Set-Up Activities

After a new Research Activity is approved by TFRI, TFRI will create a new Research Activity (RA) within the RA-FRS system. TFRI will provide the Project Leader access to the RA through their email address. Once the Project Leader logs in, he/she may add details or may designate a Project Manager who can take on responsibility for entering the RA details and the system activities. How the information is entered will define the structure of the RA and allow organization of the RA into components referred to as projects. This structure will be maintained through budget entry. Leveraged funders (if applicable) may be entered and the budget is entered. Finally, a file containing tasks and deliverables is uploaded. Once this is complete, the Project Leader or Project Manager uses the Signature and Submission page to submit the RA budget.

Once the RA budget is approved by TFRI, three new menu links will be accessible to the Project Leader and Project Manager:

- Instalments and Reconciliation
- Quarterly Expenditure Report
- Reports

These links are used to complete quarterly and annual reporting tasks in the system.

3.2. Quarterly Activities

At the beginning of each quarter, TFRI releases payments to each Site. TFRI records the payment amount for each institution Site/PI on the Instalments and Reconciliation page. The Institution Financial Representative validates the receipt of the instalment. After the Quarterly Expenditure Report (QER) is submitted, TFRI recommends a diagnostic action and the Project Leader/Project Manager approves the decision. The system maintains a record of quarterly reconciliation diagnostics.

After the end of each quarter, the Financial Representative of each Site is responsible for entering details into the QER for their applicable projects. The QER is designed to report actual expenditures against the budget for the quarter.

The Project Leader/Project Manager reviews each Site's report by project before submitting the QER 45 days after quarter end.

Depending on reporting frequency, the RA may be required to upload a Research Report on progress quarterly, bi-annually or annually.

3.3. Annual Activities

After the end of TFRI's fiscal year (March 31) and after the QER for January to March is submitted each year, Annual Sign-Off forms for each Site/PI must be downloaded. They must be signed by the PI that is responsible for the research project at that Site/PI as well as the Institution Financial Representative. The Annual Sign-Off forms are scanned and uploaded as PDFs back onto the system. The Annual Sign-Off lists cash receipts and expenditures and is a summary by fiscal year. It is automatically generated by the system and must be downloaded after the QER is submitted.

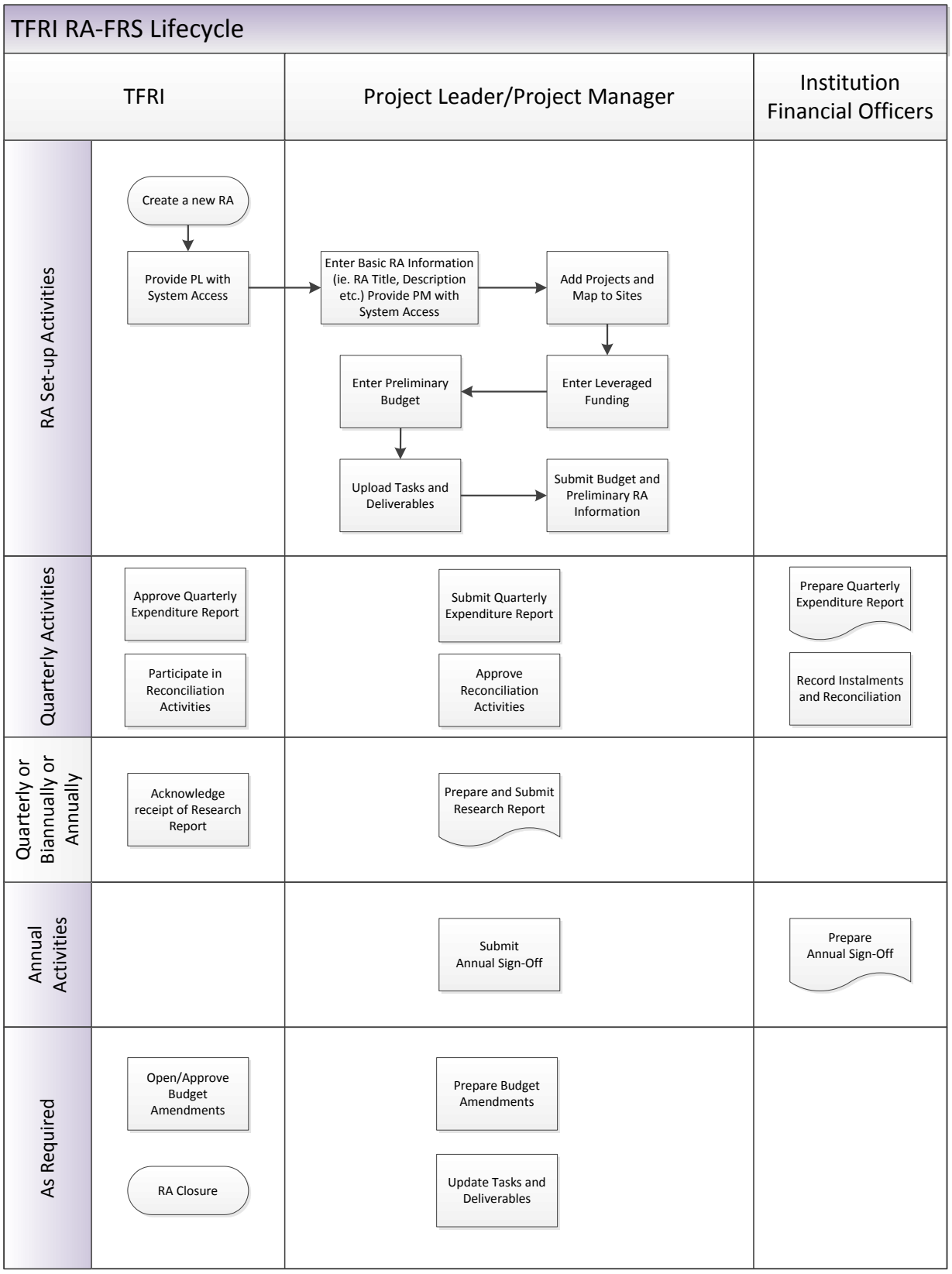
Note! One Annual Sign-Off form is required for each Site/PI combination in the RA. This means several PDFs may be required after each fiscal year.

Depending on reporting frequency, the RA may be required to upload a Research Report on progress quarterly, bi-annually or annually.

3.4. Other Activities

The tasks and deliverables file should be updated periodically, at least once a year. Budget amendments may take place as needed and are described in Part IV of this guide.

Figure 20: TFRI Budget and Reporting Process



PART II: SETTING UP A NEW RESEARCH ACTIVITY

This part of the guide describes the steps necessary to set up a new RA. This includes filling in basic RA information, recording the budget for the RA (already "pre-approved" outside of the RA-FRS by TFRI), adding leveraged funding and uploading tasks and deliverables.

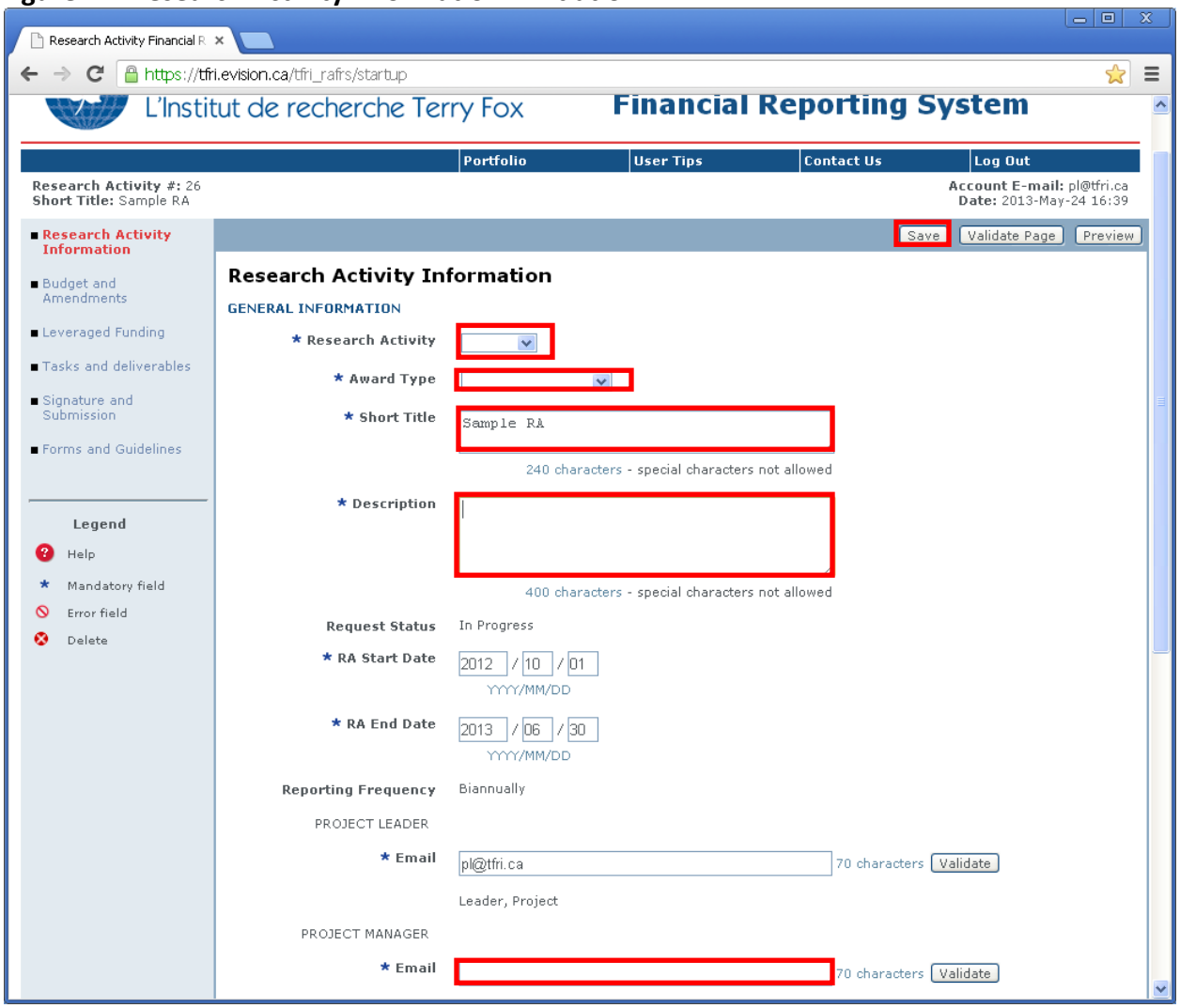
3.5. RA Initiation

Once TFRI has notified the Project Leader that an RA is set up, the Project Leader must log on to the system at https://tfri.evision.ca/tfri_rafrs/startup. After logging in, the RA will display on a list on the Portfolio page. Click the RA Number link under the Project/Core column in the table to access the RA.

Figure 21: Portfolio Screen

The Research Activity Information screen is an important part of the process to set up the project and map projects to Sites and specific PIs prior to inputting details of the budget.

Figure 22: Research Activity Information - Initiation



Here the Project Leader must fill in the four fields marked with an asterix * on the screen. These are:

- **Research Activity** type (one choice, Project)
- **Award Type** (consult with TFRI as to which should be selected)
- **Short Title**
- **Description**
- **RA Start and End Dates** (pre-filled by TFRI, these should be confirmed and may be changed if there is an error. After saving, these will no longer be allowed to be changed)

For **Award Type**, there are 5 choices:
Operating Grant (choose for New Investigators)
Research Program (choose for New Frontiers Program Project Grants)
TFRI Pilot (choose for Translational Projects Pilots)
TFRI Project (choose for Translational Projects)
Training Award (choose for Trainees)

In addition, one more field must be filled out, to assign a Project Manager.

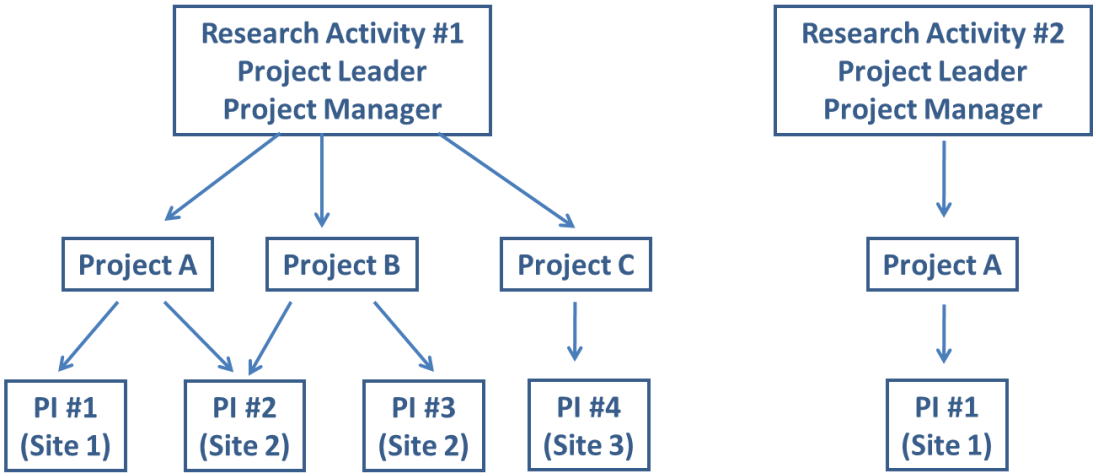
3.6. Assign a Project Manager

The Project Leader must designate a Project Manager. In certain circumstances the Project Manager may be the same person as the Project Leader. Please discuss with TFRI in this case. All individuals added in the system are identified by their email address and must have previously registered in order to be added to an RA. Once the Project Manager's email address has been entered, click **Validate** to confirm they are in the system, and then **Save**. Once this step is taken, the Project Leader may log out and the Project Manager can manage the rest of the duties in RA setup.

3.7. Add Institutions (Sites)

The Project Leader/Project Manager must add the Institutions (Sites) involved in the RA. Institutions involved in a funded program that do not have an assigned budget should not be included. An Institution will be responsible for providing received funding to the designated PI.

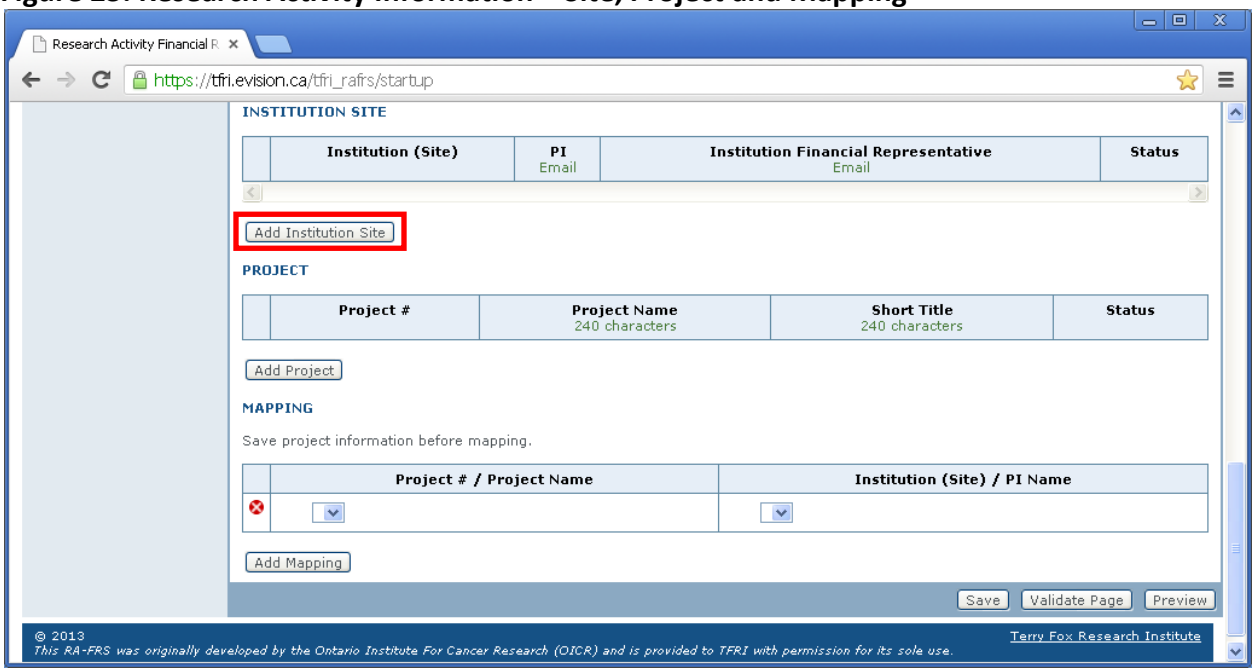
The RA can have a simple design (Research Activity #2 below) or more complex (Research Activity #1 below), with multiple Site and PI relationships to Projects.



PI = any investigator identified in the budget as receiving funds
Project Leader = Principal Applicant/Nominated Principal Investigator. Only one can be assigned

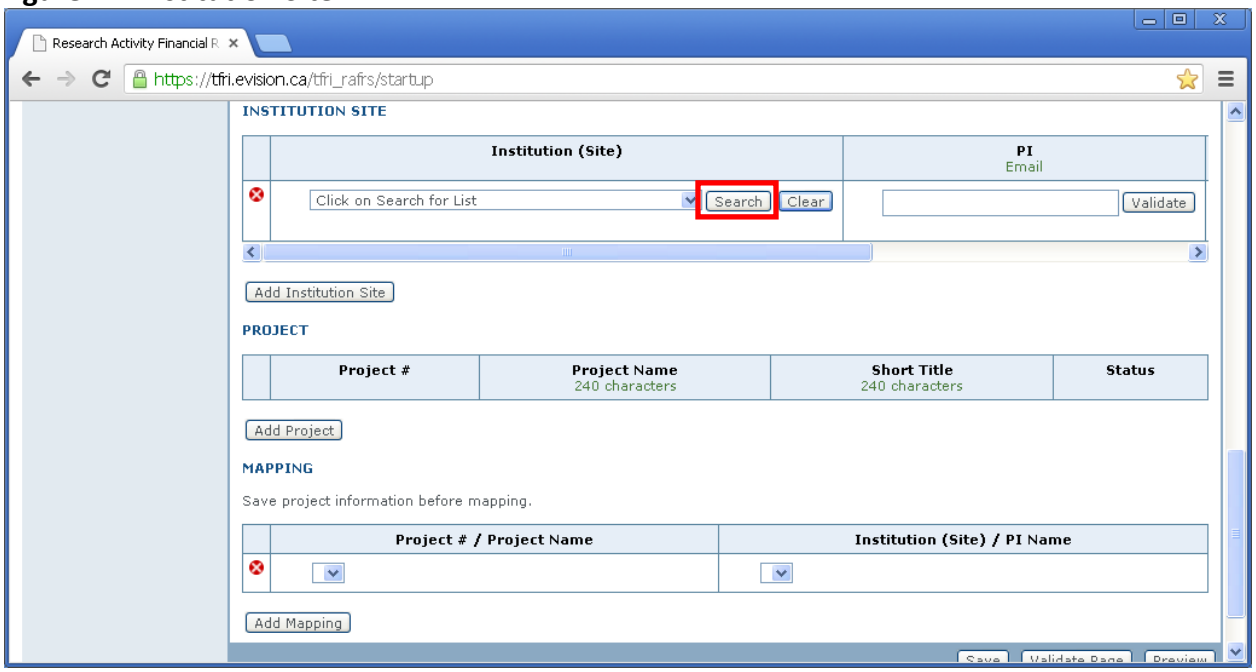
To add an Institution, click **Add Institution Site**.

Figure 23: Research Activity Information – Site, Project and Mapping



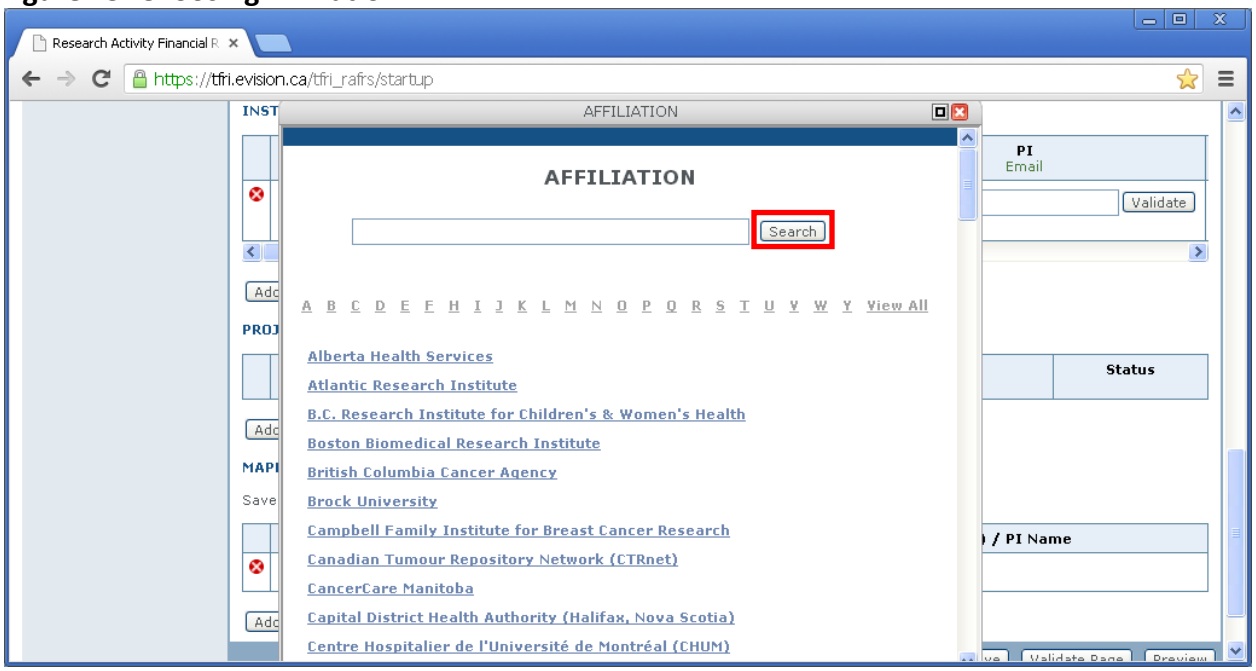
A row under Institution Site opens up. Click **Search** to open the **Affiliation** search screen.

Figure 24: Institution Site



Use the search screen to find the Institution **(Figure 25)**. You may search for sites alphabetically or by entering the first few letters of the name in the search field and clicking **Search**. If you cannot find a particular Institution, please contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca. Once the Institution is found, select by clicking the name.

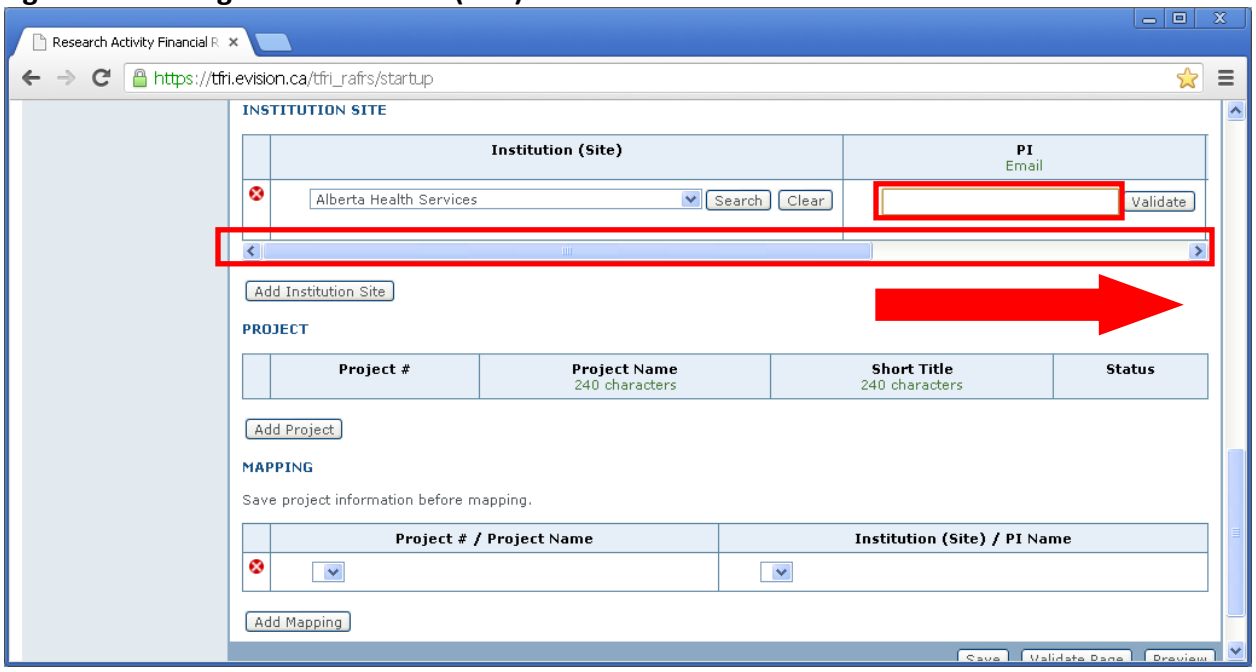
Figure 25: Choosing Affiliation


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
AFFILIATION
AFFILIATION
Search
A B C D E F H I J K L M N O P Q R S T U V W Y View All
Alberta Health Services
Atlantic Research Institute
B.C. Research Institute for Children's & Women's Health
Boston Biomedical Research Institute
British Columbia Cancer Agency
Brock University
Campbell Family Institute for Breast Cancer Research
Canadian Tumour Repository Network (CTRnet)
CancerCare Manitoba
Capital District Health Authority (Halifax, Nova Scotia)
Centre Hospitalier de l'Université de Montréal (CHUM)
PI
Email
Validate
Status
/ PI Name

The next step to filling out the information for the Institution is to add the associated PI and Financial Representative. Enter the email address for the **PI** and click **Validate**. Once it is confirmed that the PI is registered in the system, use the scroll bar to scroll to the right.

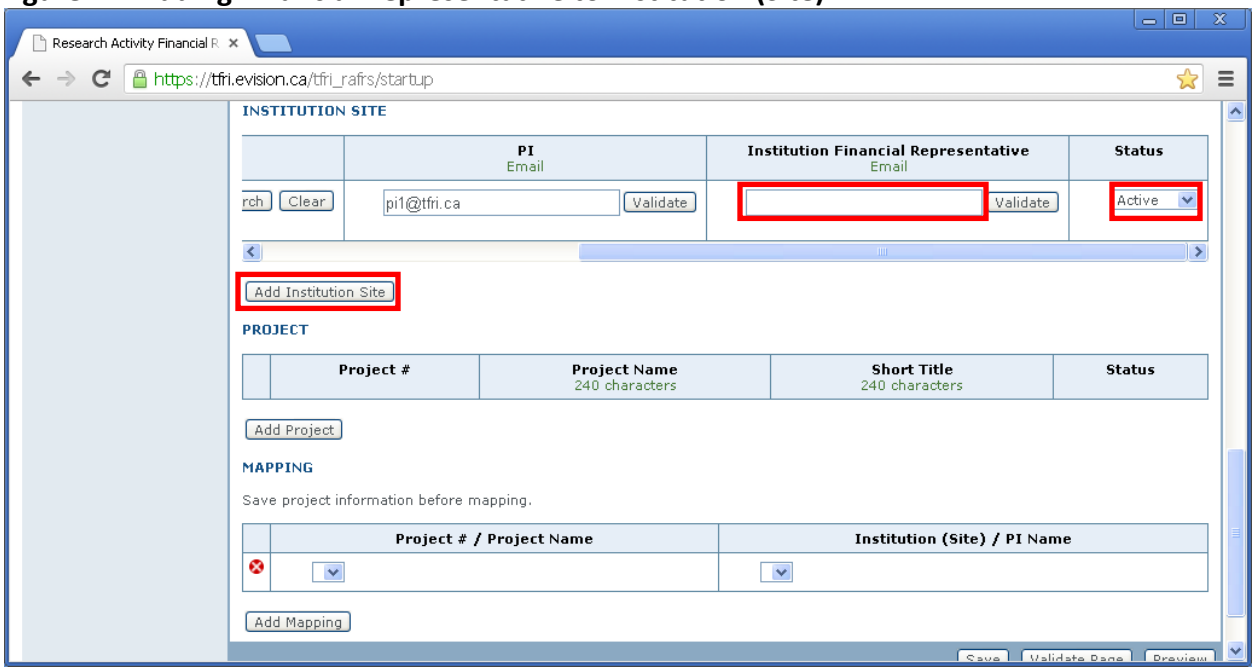
In this system, a PI is any investigator receiving funds from the TFRI project. He/she may have such a designation as "Principal Investigator, Co-Investigator, Co-Principal Investigator, Co-PI, Co-I" etc. but in the RA-FRS the role is referred to as "PI". Note that though account registration in the system is required for PIs, they are not likely to have any tasks associated with them. The Project Leader should also be listed if he/she is receiving funds, along with his/her associated Financial Representative.

Figure 26: Adding PI to Institution (Site)



After scrolling to the right, the field to enter **Institution Financial Representative** will be visible. Enter the person's email address and click **Validate**.

Figure 27: Adding Financial Representative to Institution (Site)



The Status for the Institution must be set to **Active**.

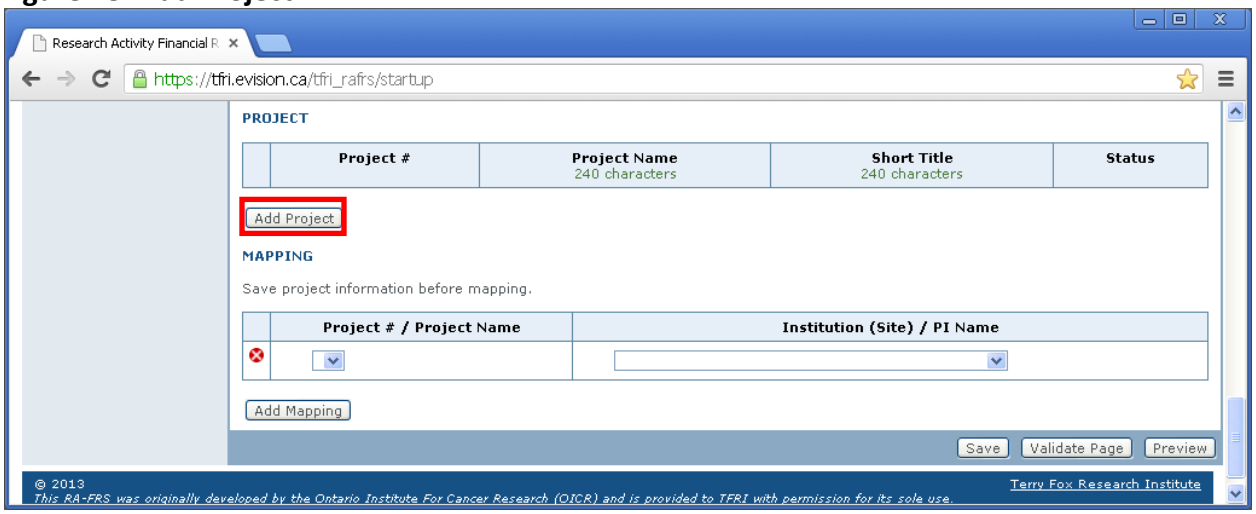
To add another Institution Site, Click **Add Institution Site (Figure 27)** and follow the same procedure as for the first Institution added. If there is more than one PI at a particular Institution, add the Institution in a new row with the new PI and associated Financial Representative.

It is recommended to save the RA after entering each Site. **Save** buttons are available at the top and bottom of each screen.

3.8. Add Projects

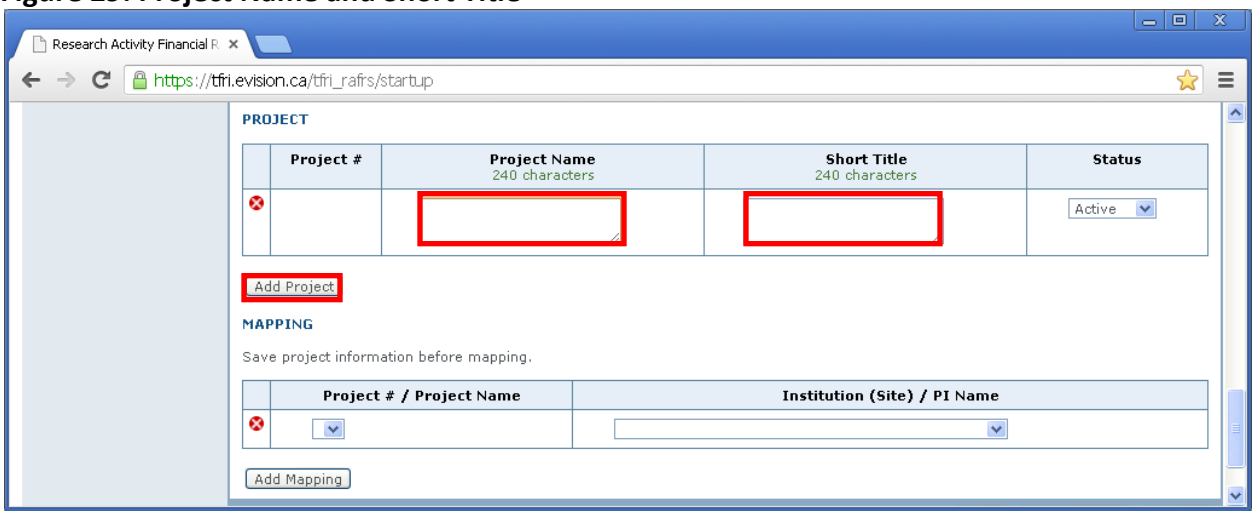
The Project Manager/Project Leader must add at least one Project for the RA. This allows for budget set-up later on. To add a Project click **Add Project**.

Figure 28: Add Project



The **Project Name** and **Short Title** must be filled in. The **Project Name** will display in the Budget later on.

Figure 29: Project Name and Short Title



To add another Project, click **Add Project (Figure 29)** and follow the same procedure as for the first Project added.

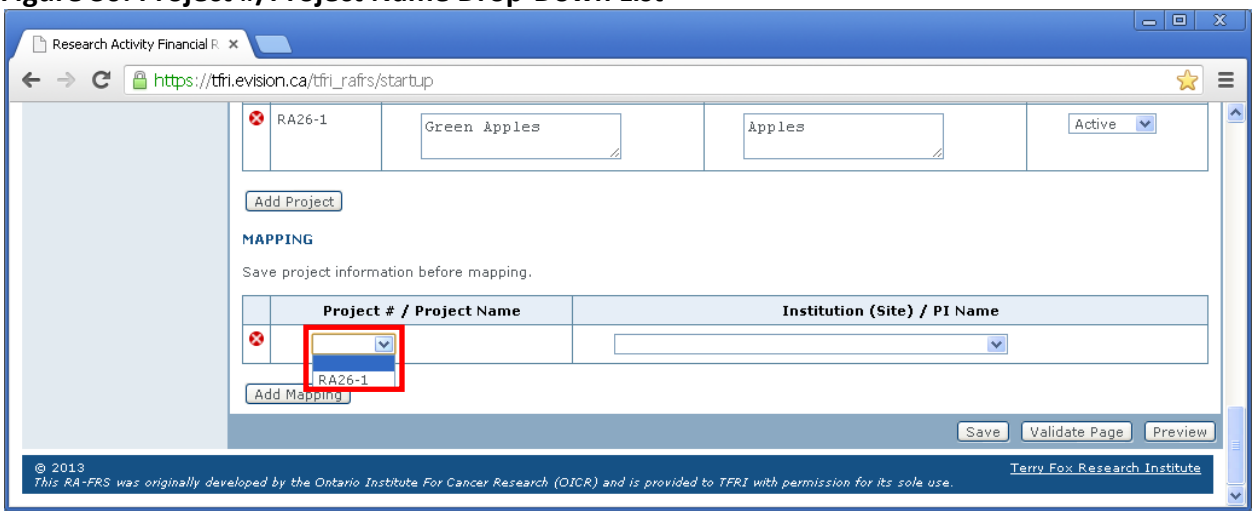
The RA must be saved after entering the Projects. **Save** buttons are available at the top and bottom of each screen. You will get a message that the RA was saved successfully, and a

project number starting with the RA number will display in the **Project #** field of the table. If you do not see this number, the project line has not been saved. Once the **Sites** and **Projects** have been saved, mapping may begin.

3.9. Map Projects to Sites

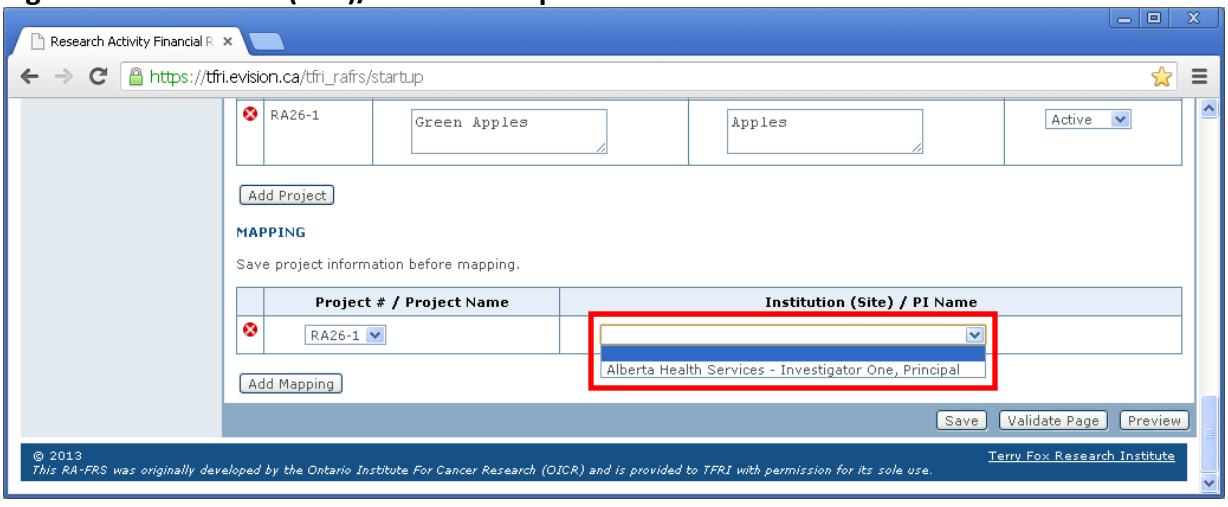
Mapping is done in order to associate Sites/PIs with Projects to organize the budget structure. At the bottom of the page there is a **Mapping** table. Select the first project from the **Project #/Project Name** drop-down list.

Figure 30: Project #/Project Name Drop-Down List



Select the Institution Site/PI from the **Institution (Site)/PI Name** drop-down list. If there is more than one PI at a particular Institution in your RA, please ensure to select the correct PI.

Figure 31: Institution (Site)/PI Name Drop-Down List



After mapping, click the **Save** button. An Institution Site/PI may be associated with more than one project. Each project may have multiple Institution Site/PIs assigned to it. To add another Mapping, click **Add Mapping (Figure 31)** and follow the same procedure as for the first mapping.

A summary of all data entered may be seen using the **Preview** button. To ensure all fields have been filled out, the **Validate Page** button may be clicked.

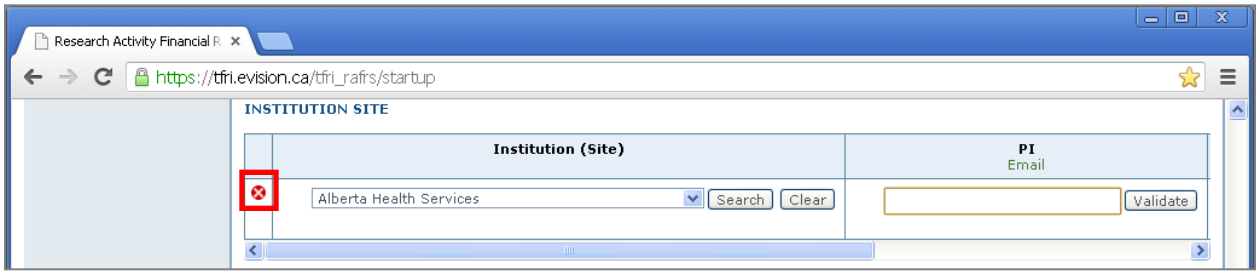
3.10. Delete a Site, Project or Mapping

It is possible to delete a Site, Project or Mapping if it has been mapped incorrectly. The process for this varies depending on what stage of setup the RA is at.

3.10.1. Delete a Project/Institution Site before Mapping is Complete

If the Project/Site mapping has not already been completed, press the **Delete** button next to the Project or Site to be deleted

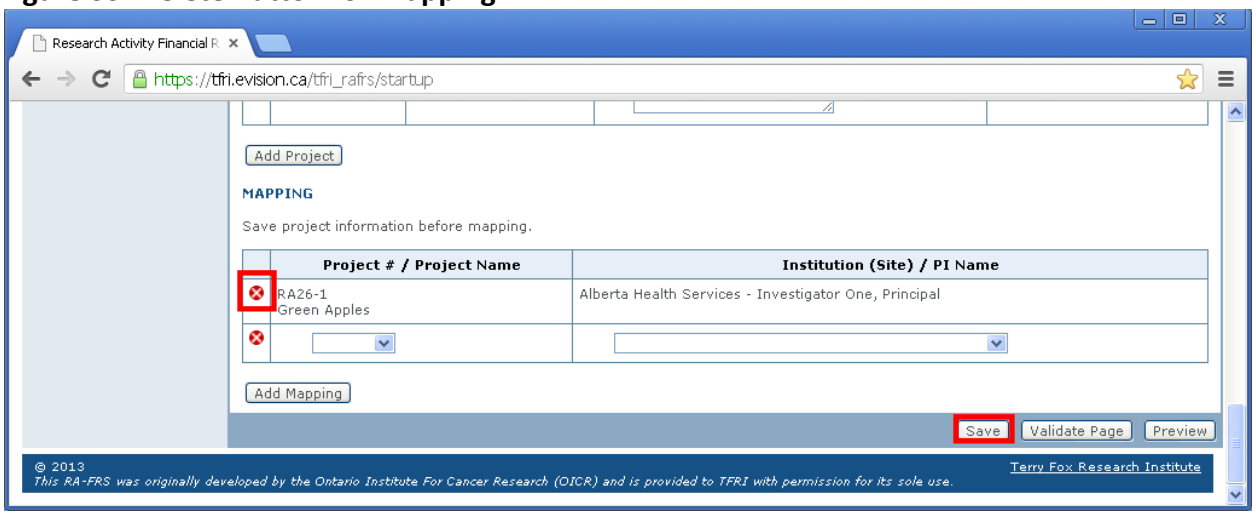
Figure 32: Delete Button for Sites and Projects Prior to Mapping Completion



3.10.2. Delete a Project/Institution Site After Mapping is Complete

If the Project/Site mapping is already complete, it is first necessary to delete any mappings involving the project or site in question. Press the **Delete** button next to the mapping to be removed and press the **Save** button at the bottom of the screen.

Figure 33: Delete Button for Mapping


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
Add Project
MAPPING
Save project information before mapping.
Project # / Project Name
Institution (Site) / PI Name
RA26-1
Green Apples
Alberta Health Services - Investigator One, Principal
Add Mapping
Save
Validate Page
Preview
© 2013
This RA-FRS was originally developed by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
Terry Fox Research Institute

3.10.3. Delete a Project/Institution Site after Budget is Complete

It is more complex to delete a Project, Site or Mapping once a budget has been associated with it. To delete a Site or Project at this stage, it is necessary to delete all associated budgets first, followed by any related mapping.

To delete a budget, navigate to the **Budget and Amendments** page. Make sure that the budget to be deleted is marked as incomplete (i.e., the **Budget Complete** checkbox is **unchecked**). Click on the **Project** name and select the category where the budget line to be deleted is contained. Click the **Delete** icon next to all line items to be deleted. Repeat these steps for all lines within all Project budgets to be deleted. Once this is complete, it will be possible to delete associated mappings on the **Research Activity Information** page. Once all mappings are deleted for a Project, the Project itself may be deleted. For further assistance contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.

4. Leveraged Funding

The RA-FRS allows for two basic types of leveraged funding (1) managed in the Budget and Amendments page, and (2) not managed as part of the budget in which case the contribution can be (1) in cash, (2) in-kind as well as (a) confirmed (b) proposal pending or (c) future request.

Note! If the only funder is TFRI you do not need to enter any information on this page.

For more information about whether a funder should be managed in the budget or not, please contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca. The key difference is whether or not expenditures will be reported against funding within the RA-FRS.

4.1. Input Leveraged Funding

To begin, click on the **Leveraged Funding** option on the left menu. A data entry table is displayed. If the RA has no leveraged funding, leave this page blank. In this case, proceed to **Section 5 Create a Budget**.

Figure 34: Leveraged Funding

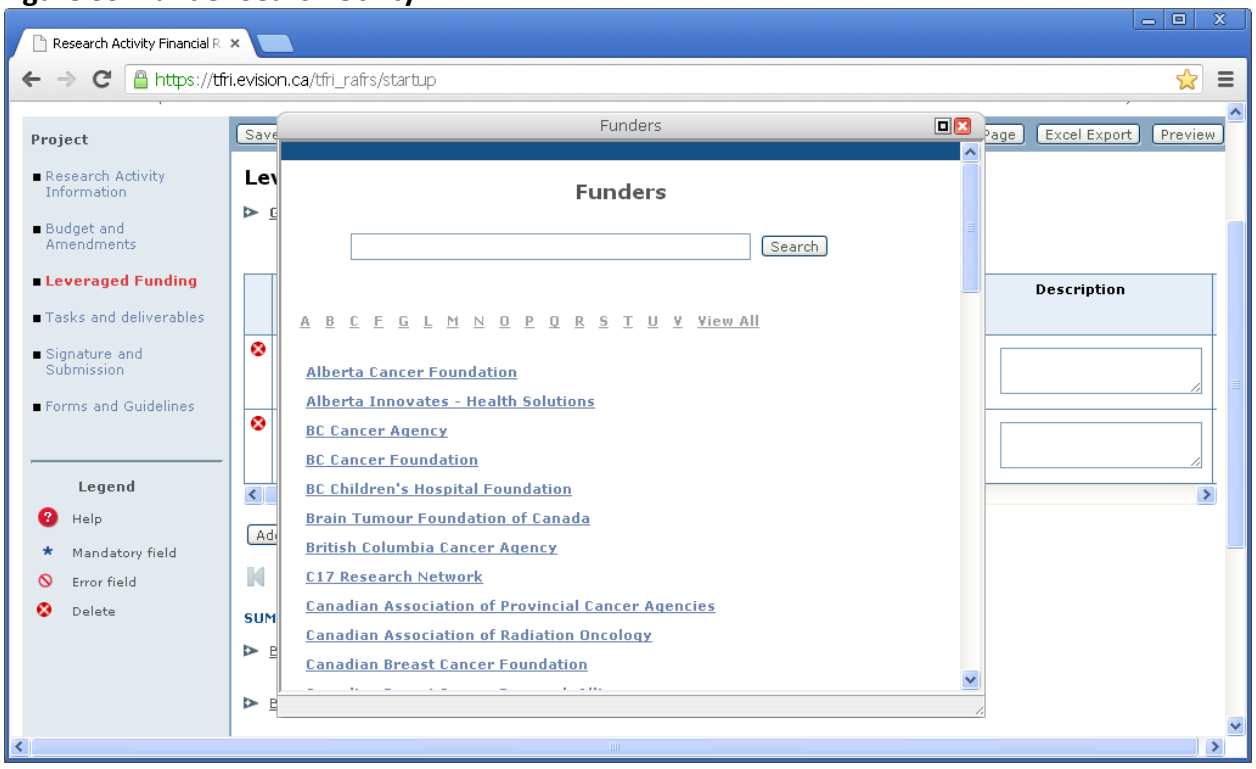
4.1.1. Leveraged Funding that is to be Managed in the Budget

If the RA has funding from a funder other than TFRI and it will be managed in the budget, check off the **Managed in Budget** checkbox and then **Save** (see **Figure 34**). This will allow that funder to be selected in the **Budget and Amendments** page when entering budget. In this case, once the page has been saved, proceed to **Section 5 Create a Budget**.

4.1.2. Leveraged Funding that will not be Managed in the Budget

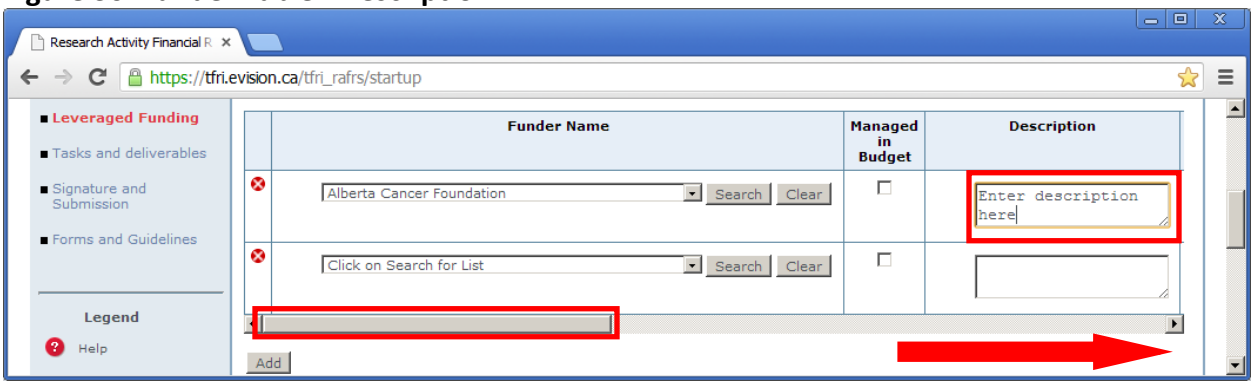
If the RA has funding from a funder other than TFRI and they will not be managed in the budget, details for the funding must be entered. Expenditures will not be reported against this type of funding within the RA-FRS. Start by searching for the funder. Click the **Search** button next to the drop-down list in the column marked **Funder Name** (see **Figure 34**). A list of funders will appear in the pop-up box. If you cannot find the funder, please contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.

Figure 35: Funder Search Utility



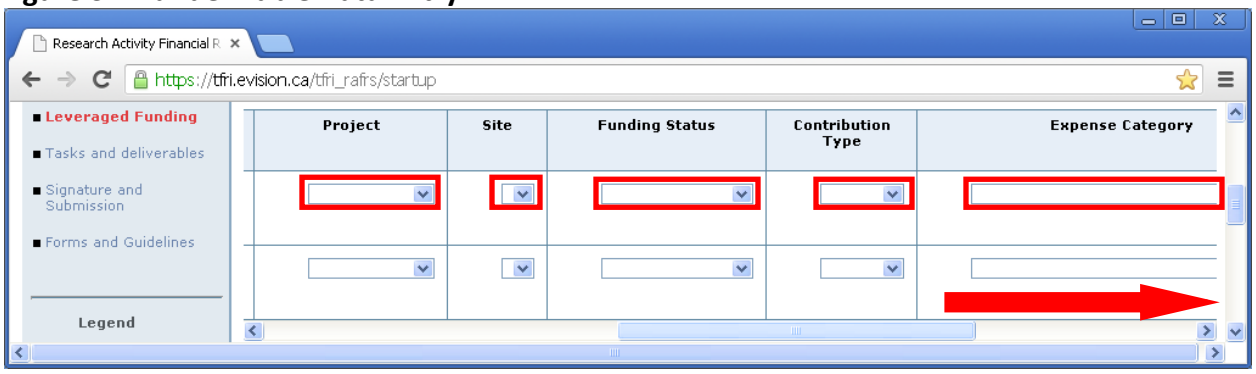
In the **Description** column, enter a brief description of the funding.

Figure 36: Funder Table - Description



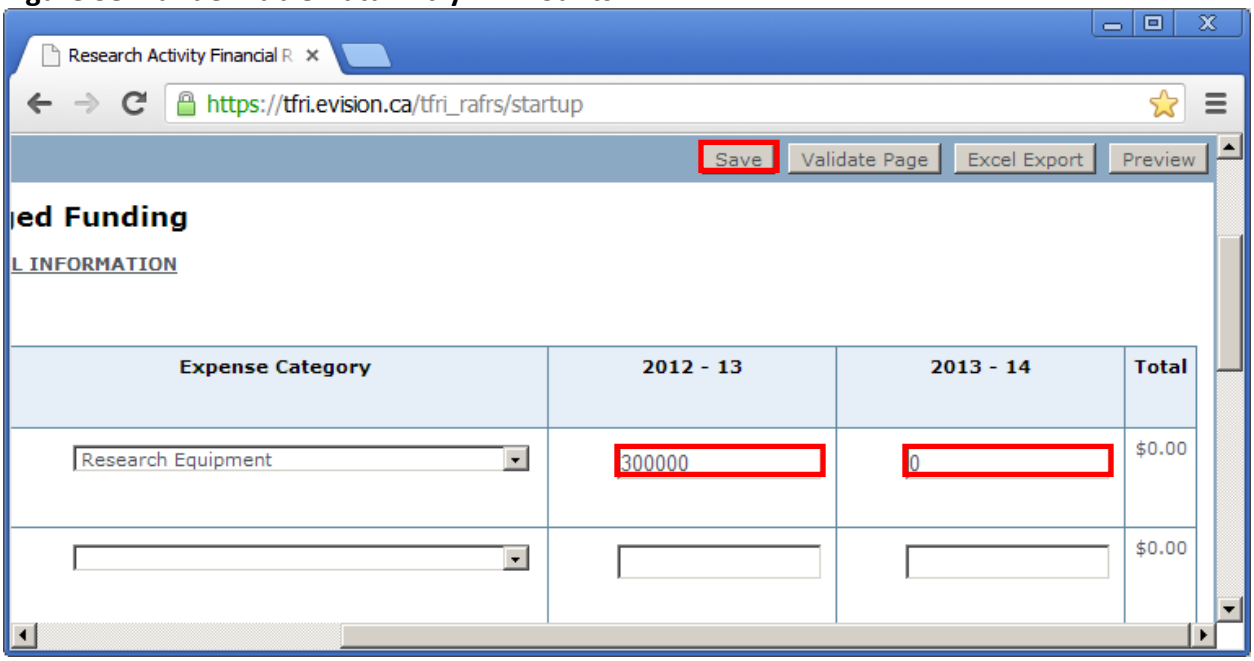
Scroll to the right using the scroll bar at the bottom of the table. In the **Project** column, select the project to which this funding applies. In the Site column, select the Institution to which this funding applies. Note that the Institution must have been set up on the Research Activity Information page (see **Section 3.7**). In the **Funding Status** column, select whether the funding is confirmed, a proposal is pending or will be a future request. Under the **Contribution Type**, select cash or in-kind from the drop-down list. Select the appropriate expense type under the **Expense Category** drop-down list.

Figure 37: Funder Table Data Entry



Continue scrolling to the right using the scroll bar at the bottom of the table. Fill in the funding amounts by TFRI fiscal year. TFRI's fiscal year starts April 1 and ends March 31. Once the funding amounts have been entered, click the **Save** button. The total contribution value will be calculated automatically in the final column once it has been saved.

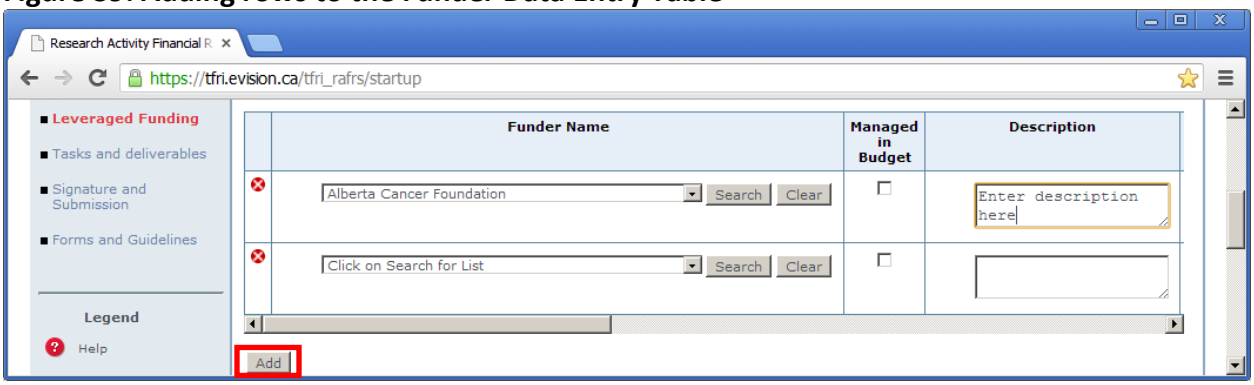
Figure 38: Funder Table Data Entry – Amounts



4.2. Add Additional Leveraged Funding

If the table does not contain enough rows for all the leveraged funding to be entered, click the Add button at the bottom left of the table. This will add another row.

Figure 39: Adding rows to the Funder Data Entry Table

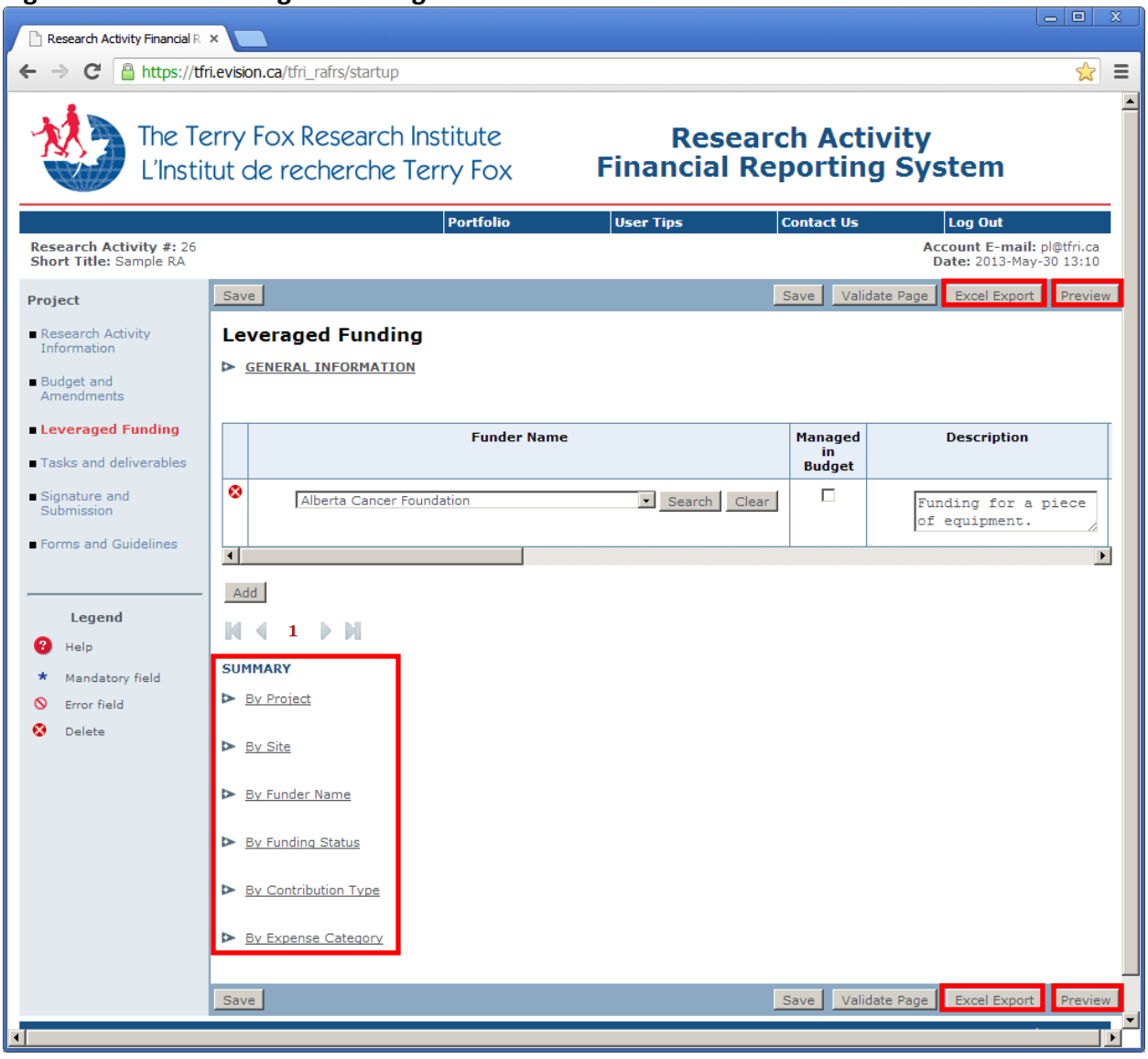


Once all Leveraged Funding has been saved, proceed to **Section 5 Create a Budget**.

4.3. View Leveraged Funding Summaries

There are different ways to view the Leveraged Funding. Scroll down to the bottom of the **Leveraged Funding** page to see the **Summary** list. Click on any of these links to see the funding displayed in a variety of ways. In addition, at the top and bottom at right of the screen, there are buttons for **Excel Export** and **Preview** that are helpful when viewing the budget. Note that the system does not support the printing of reports while in **Preview** mode. To print a summary, click the **Excel Export** button and print the file through Excel after formatting.

Figure 40: View Leveraged Funding Summaries



5. Create a Project Budget

5.1. Enter Budget Data

Once all projects have been mapped to the appropriate Sites, the RA budget may be entered. A detailed budget will have already been approved by TFRI before initiation of the RA in the RA-FRS. The level of detail for the budget required in the RA should be determined in consultation with TFRI. Generally one summary line per expense category may be entered however for some programs more detail may be required. For more information contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.

To begin, click on the **Budget and Amendments** option on the left menu. A list of all projects previously entered on the RA Information page is displayed.

Figure 41: Budget and Amendments Screen

Before completing the **Budget and Amendments** page, it is useful to learn how the RA-FRS presents information to the user. See the arrows below for a guide.

Identifies Research Activity being worked on

Expands to provide more information on the Research Activity

Expands to provide tables for budget details and figures to be input for each project

Expands to provide a summation of budget information input by project, etc.

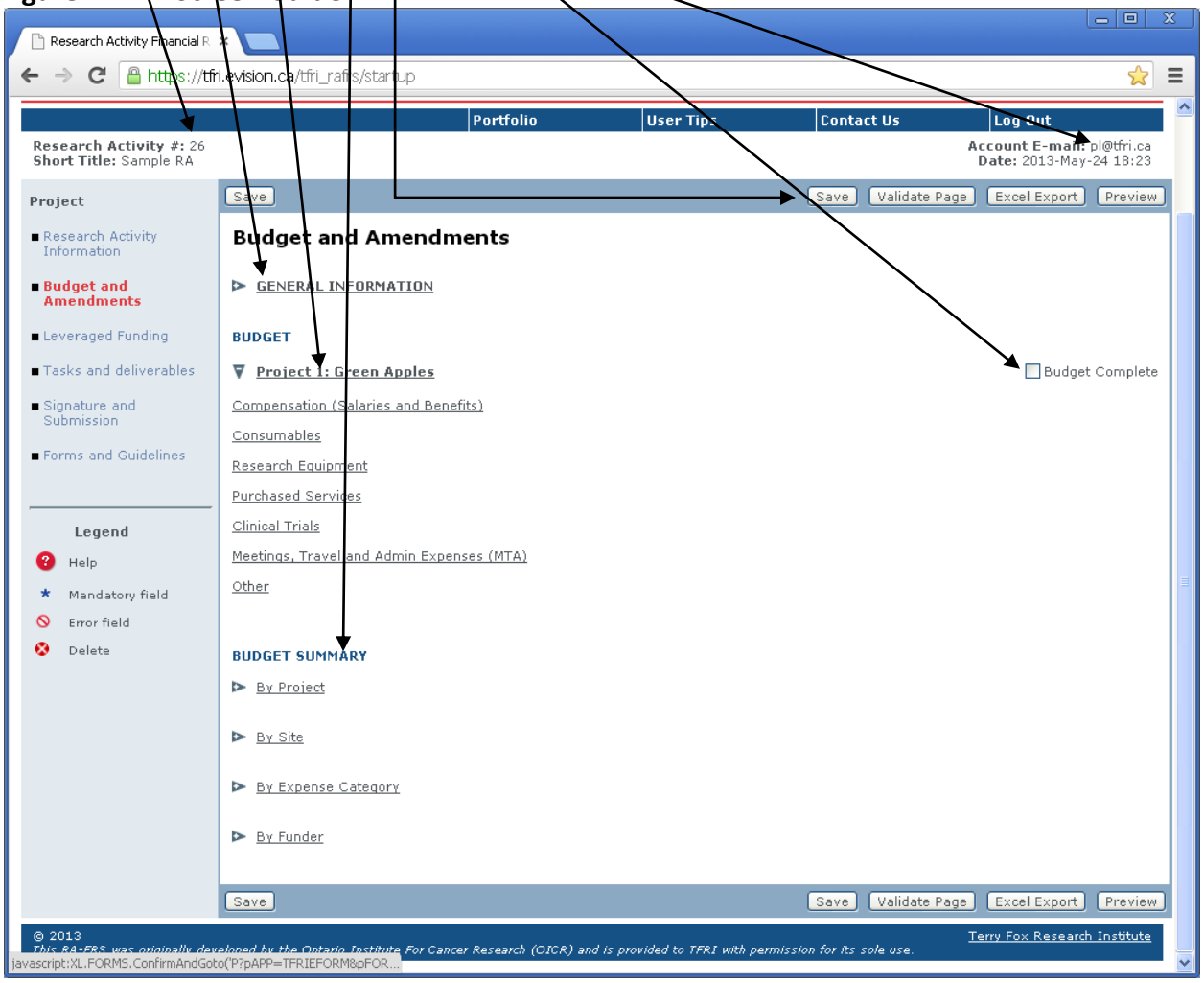
This information can also be previewed in one window or exported to Excel for printing

Once budget data is entered it should be saved and validated, and errors corrected

This button should only be ticked when the budget for each project is complete

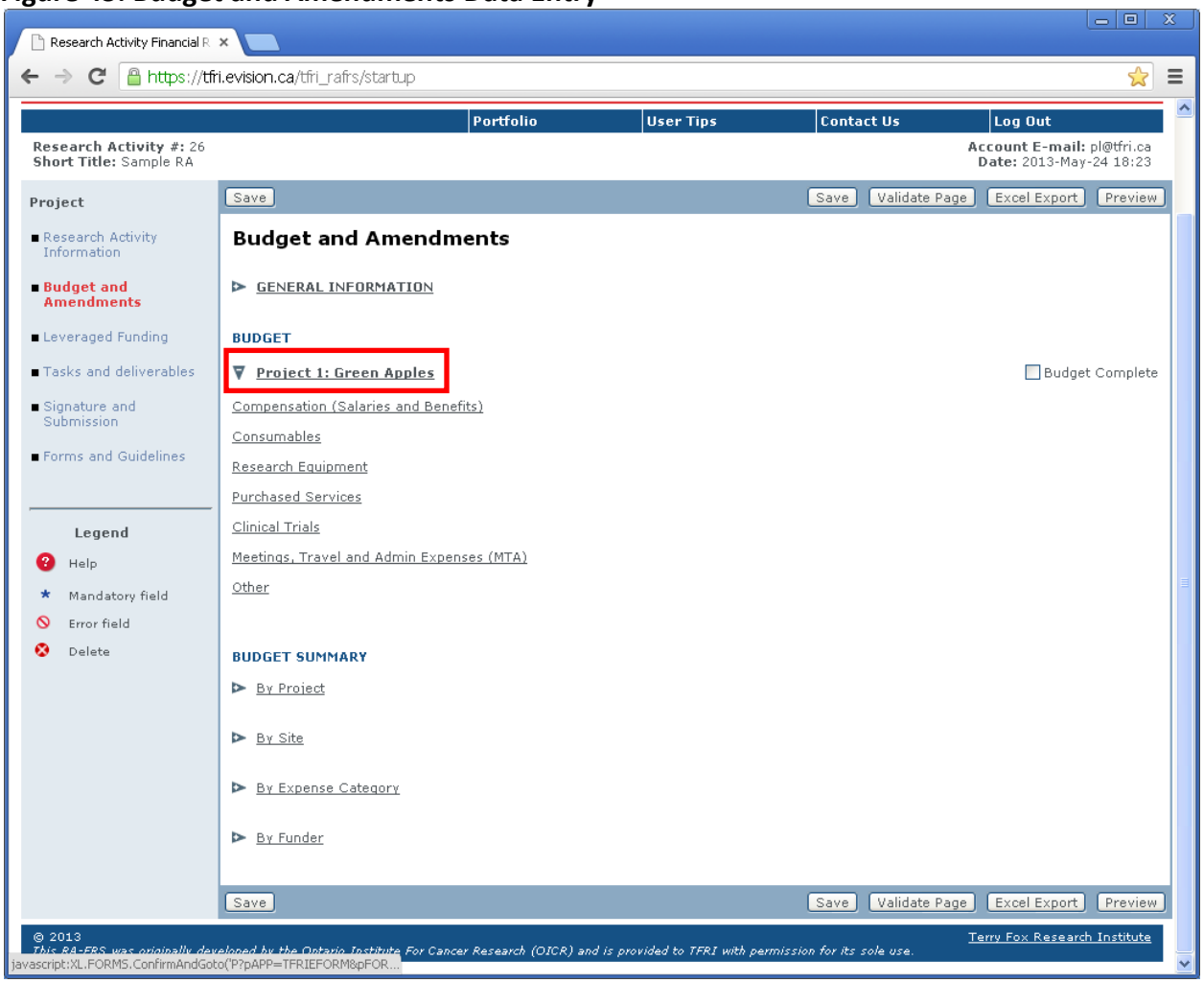
Identifies who is logged on to FRS this session

Figure 42: RA Screen Guide



Click on the first Project listed. The page will refresh and reveal seven expense categories.

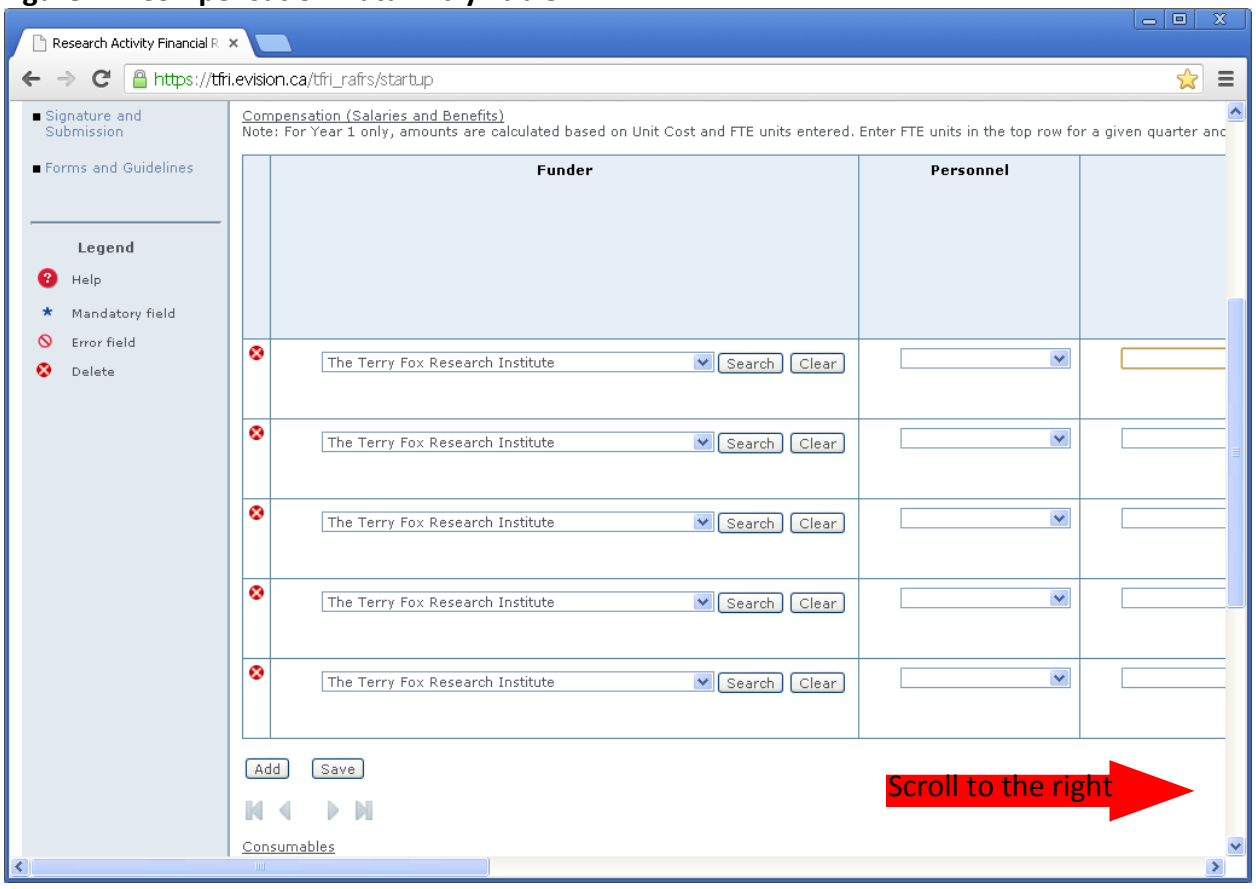
Figure 43: Budget and Amendments Data Entry



Upon clicking each category, a table for data entry will display. Use the scroll bars at bottom and right of your browser to navigate all the way to the right and fill in the table information. Using the tab bar on your keyboard is a helpful way to ensure you have completed each field. The **Compensation** data table is shown below as an example for data entry. For all category types, Year 1 is auto-calculated based on FTE or unit amount entered, and is broken down into quarters. For all subsequent years, all values are manually entered and it is an annual amount only. Note that amounts are entered by fiscal year. TFRI's fiscal year starts April 1 and ends March 31.

Note! The default funder in all budget entry tables is TFRI. If there are other funders involved and you can't find them through the **Search** button, refer to **Section 4.0** of this guide. The funder will need to first be set up through the **Leveraged Funding** page.

Figure 44: Compensation Data Entry Table



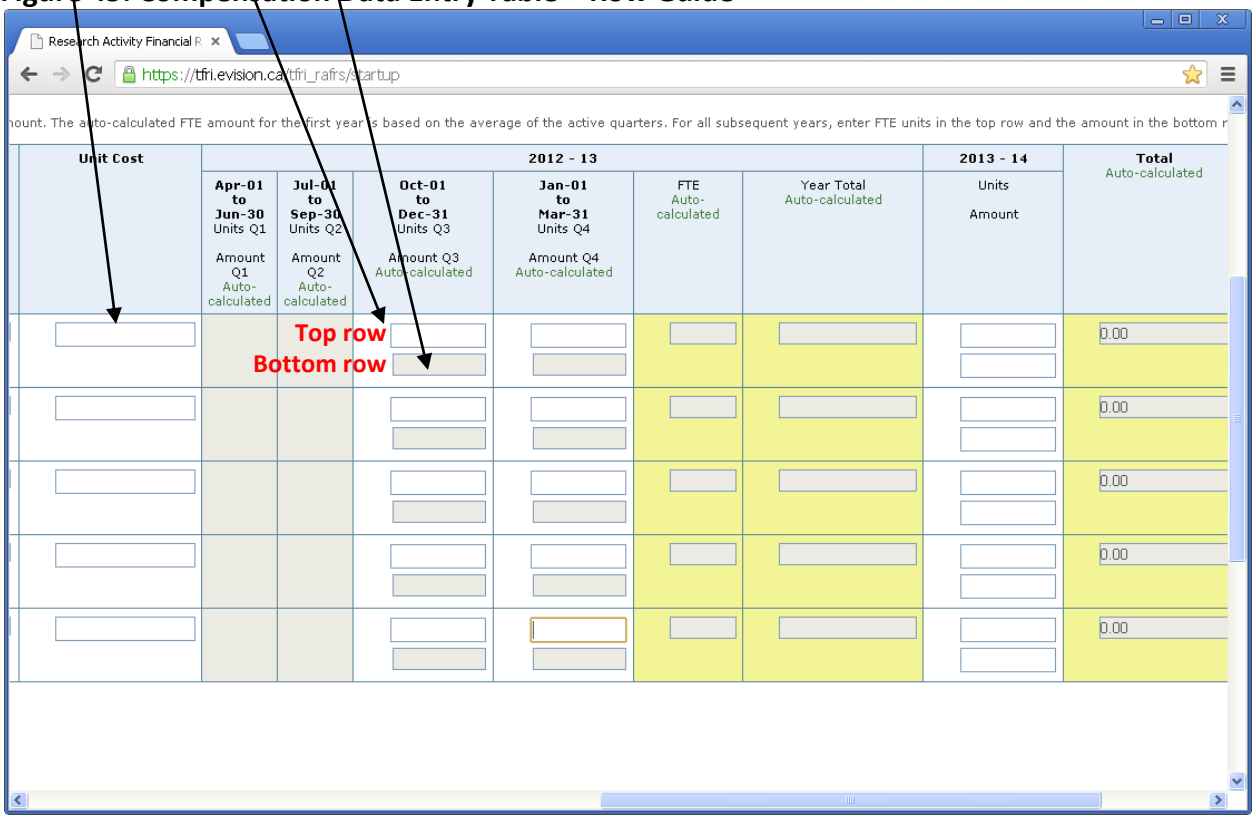
For the Compensation category, enter FTE units in the top row for a given quarter and the bottom row will auto-calculate the amount (see **Figure 45**). The auto-calculated FTE amount for the first year is based on the average of the active quarters. For all subsequent years, enter FTE units in the top row and the amount in the bottom row (it is not auto-calculated).

Enter salary for one year at 1 FTE here, including benefits

Enter FTE units in the top row. Partial FTEs may be entered using up to 2 decimal places

The bottom row will be populated with the budgeted amount using the FTE amount entered in the top row (year 1 only – after that it must be manually entered)

Figure 45: Compensation Data Entry Table – Row Guide



After entering all applicable budget for a line, scroll to the right and enter a brief justification. To add additional lines to an expense category, click the **Add** button located at the bottom of the table (scroll back to the left).

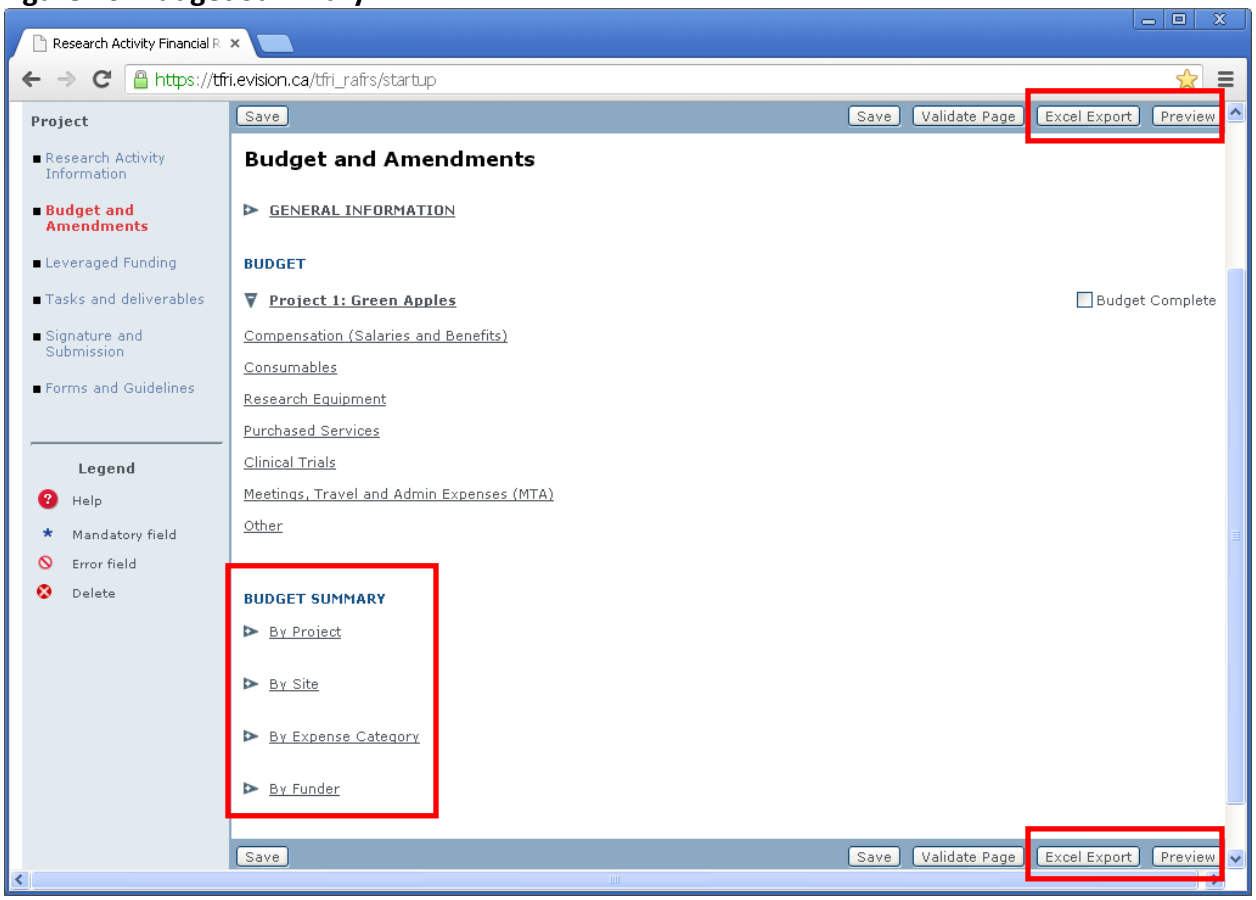
It is recommended to save your budget after every few lines. Always save before moving on to the next expense category. **Save** buttons are located at the top and bottom of the screen. Additional **Save** buttons are located at the left and right on the bottom of each expense category data entry table.

Entering the budget for the remaining expense categories is very similar to the example shown above.

5.2. View Budget Summaries

There are different ways to view the budget. Scroll down to the bottom of the **Budget and Amendments** page to see the **Budget Summary** list. Click on any of these links to see the budget displayed in a variety of ways. In addition, at the top and bottom at right of the screen, there are buttons for **Excel Export** and **Preview** that are helpful when viewing the budget. Note that the system does not support the printing of reports while in **Preview** mode. To print a summary, click the **Excel Export** button and print the file through Excel after formatting.

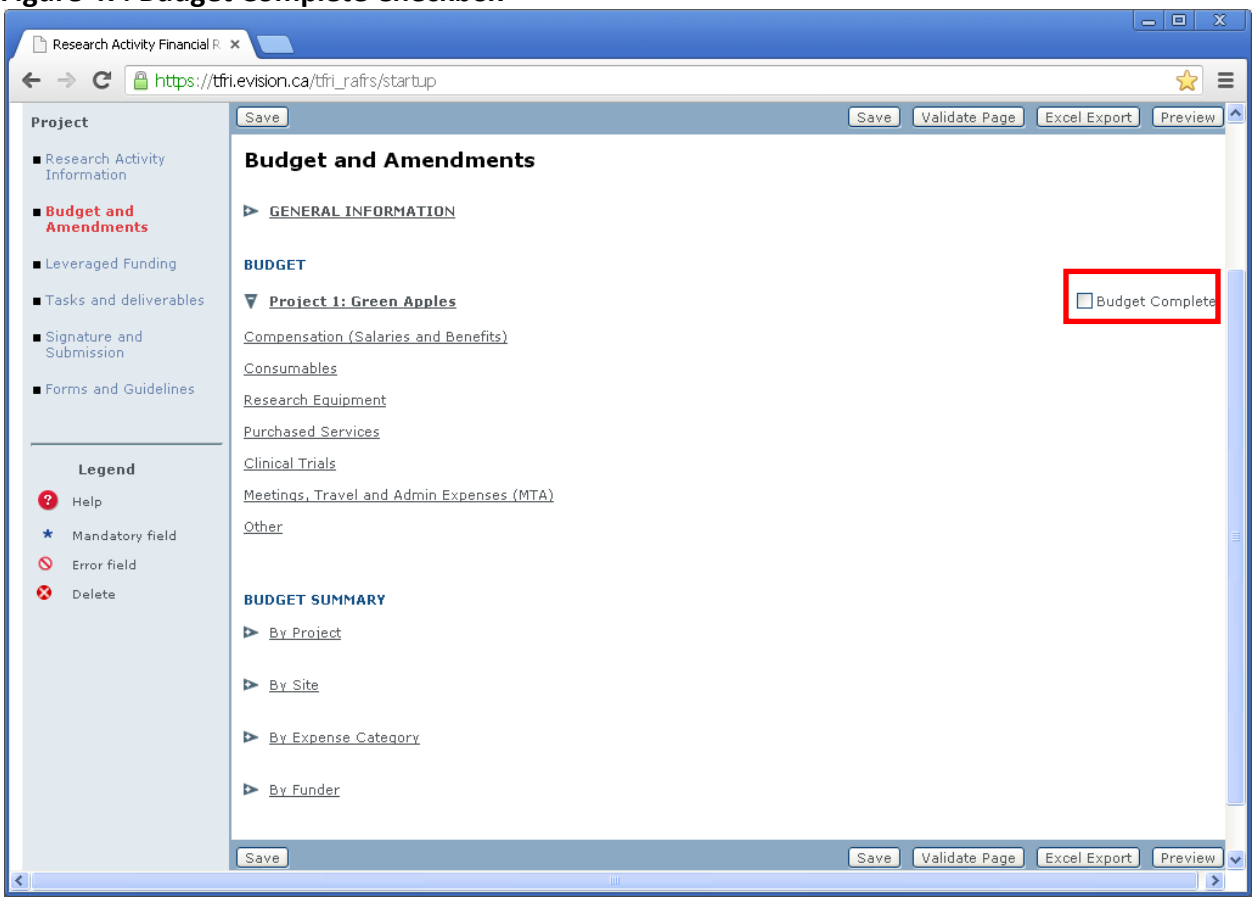
Figure 46: Budget Summary



5.3. Complete a Project Budget

When the budget has been completed for a particular project, check the **Budget Complete** checkbox to the right of the project title. All Budget Complete checkboxes for all projects must be checked before a budget can be submitted for review by TFRI.

Figure 47: Budget Complete Checkbox



It is understood that as programs/projects proceed there may be a need to carry out an amendment to the budget. The RA-FRS has a budget amendment component for such purposes. This feature is described in **Section 12** of this guide.

6. Tasks and Deliverables

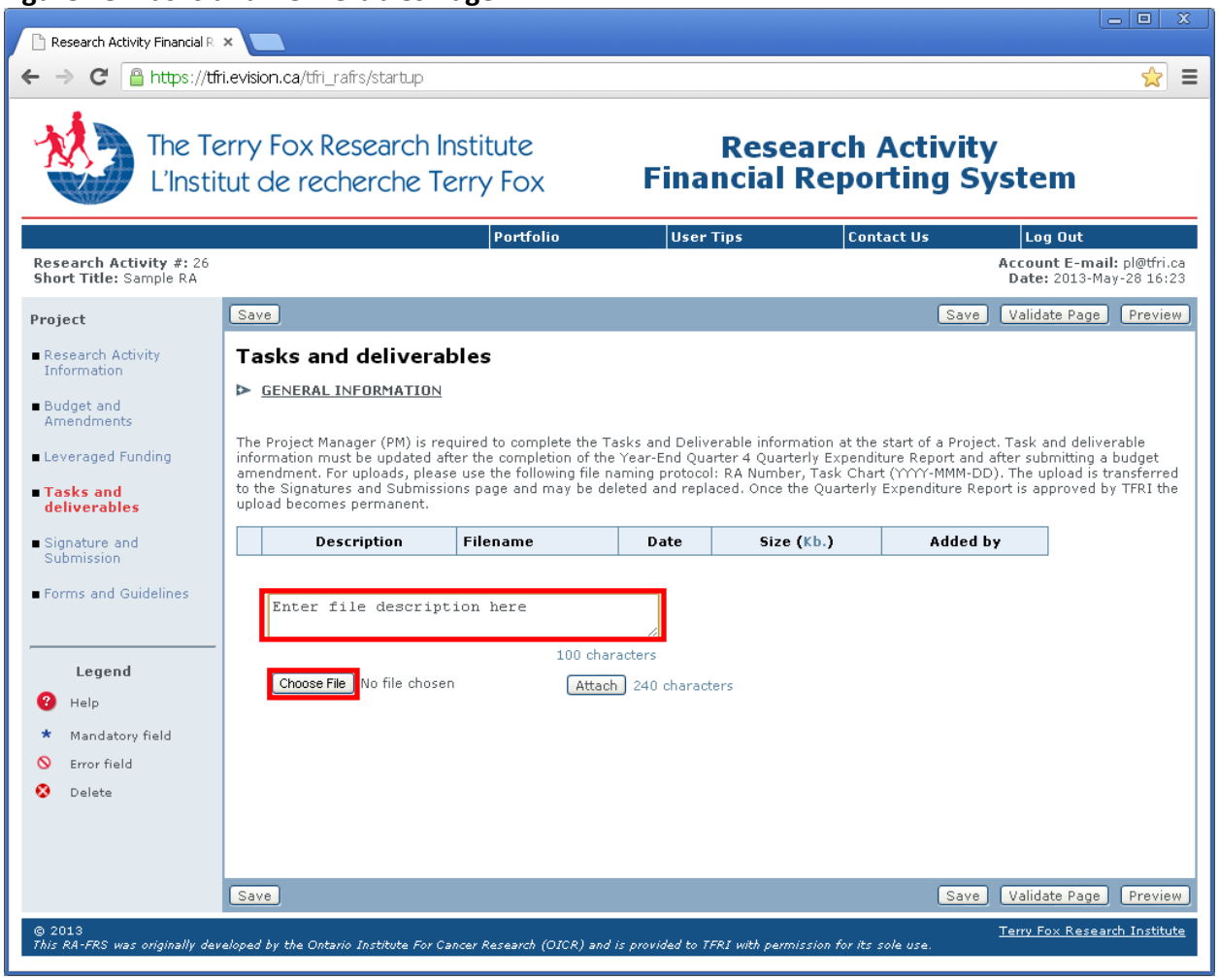
The Project Manager is required to complete the Tasks and Deliverables information at the start of the RA. The Tasks and Deliverables chart should be prepared outside of the system using Excel or project management software. The file may be saved in a variety of formats (pdf,xls,xlsx,mpp,doc,docx,vdx,vsx,vtx,vsd,vss,vst,jpeg,jpg,gif,ppt,pptx). Once it is ready for

upload, name the file using the following protocol: **RA Number Task Chart (YYYY-MMM-DD)**. Maximum file size for attachments is 5 megabytes.

6.1. Upload the Tasks and Deliverables Chart

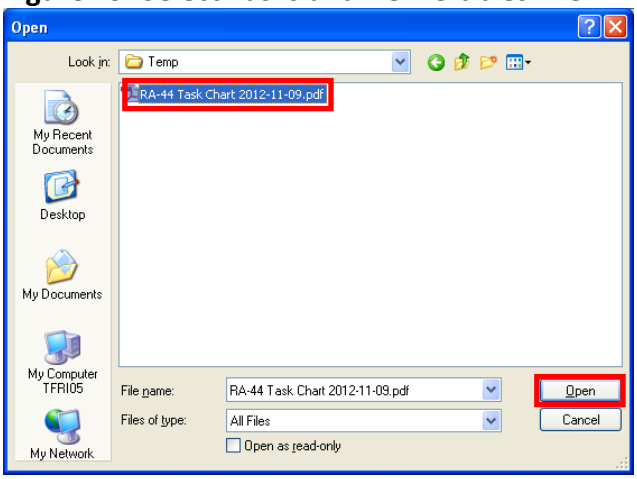
To upload a file, click the **Tasks and Deliverables** option on the left menu. Enter the name of the file in the text box provided, then click **Choose File**.

Figure 48: Tasks and Deliverables Page


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
Portfolio
User Tips
Contact Us
Log Out
Research Activity #: 26
Short Title: Sample RA
Account E-mail: pl@tfri.ca
Date: 2013-May-28 16:23
Project
Research Activity Information
Budget and Amendments
Leveraged Funding
Tasks and deliverables
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
Save
Validate Page
Preview
Tasks and deliverables
GENERAL INFORMATION
The Project Manager (PM) is required to complete the Tasks and Deliverable information at the start of a Project. Task and deliverable information must be updated after the completion of the Year-End Quarter 4 Quarterly Expenditure Report and after submitting a budget amendment. For uploads, please use the following file naming protocol: RA Number, Task Chart (YYYY-MMM-DD). The upload is transferred to the Signatures and Submissions page and may be deleted and replaced. Once the Quarterly Expenditure Report is approved by TFRI the upload becomes permanent.
Description
Filename
Date
Size (Kb.)
Added by
Enter file description here
100 characters
Choose File
No file chosen
Attach
240 characters
© 2013
This RA-FRS was originally developed by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
Terry Fox Research Institute

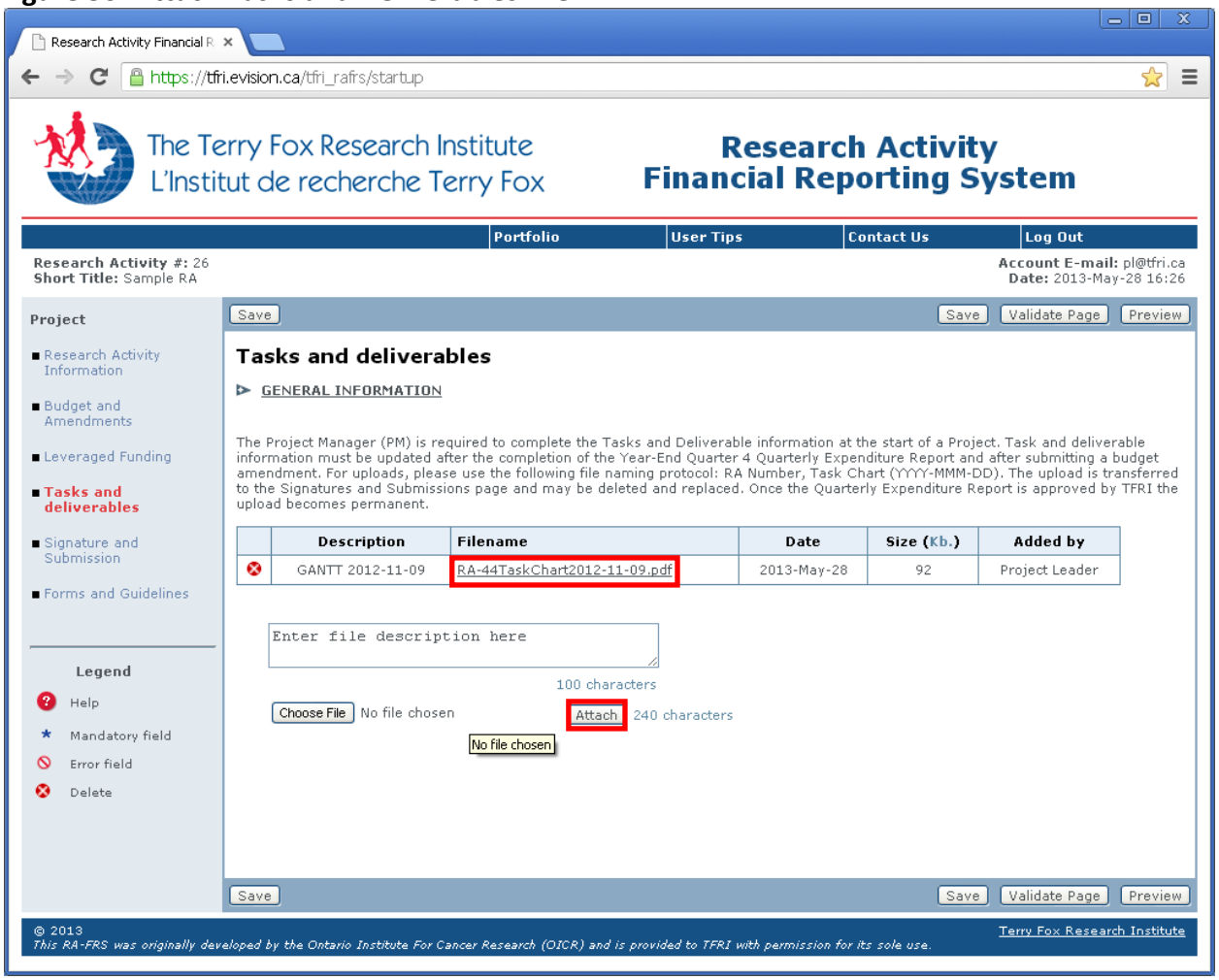
Navigate to where the file is saved on your computer and select it. Click **Open**.

Figure 49: Select Tasks and Deliverables File



After the file is selected and information has been entered in the text box, click **Attach**. In the table displayed on the page, the file will now be accessible through a link.

Figure 50: Attach Tasks and Deliverables File


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
Portfolio
User Tips
Contact Us
Log Out
Research Activity #: 26
Short Title: Sample RA
Account E-mail: pl@tfri.ca
Date: 2013-May-28 16:26
Project
Research Activity Information
Budget and Amendments
Leveraged Funding
Tasks and deliverables
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
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Validate Page
Preview
Tasks and deliverables
GENERAL INFORMATION
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Description
Filename
Date
Size (Kb.)
Added by
GANTT 2012-11-09
RA-44TaskChart2012-11-09.pdf
2013-May-28
92
Project Leader
Enter file description here
100 characters
Choose File
No file chosen
Attach
240 characters
No file chosen
© 2013
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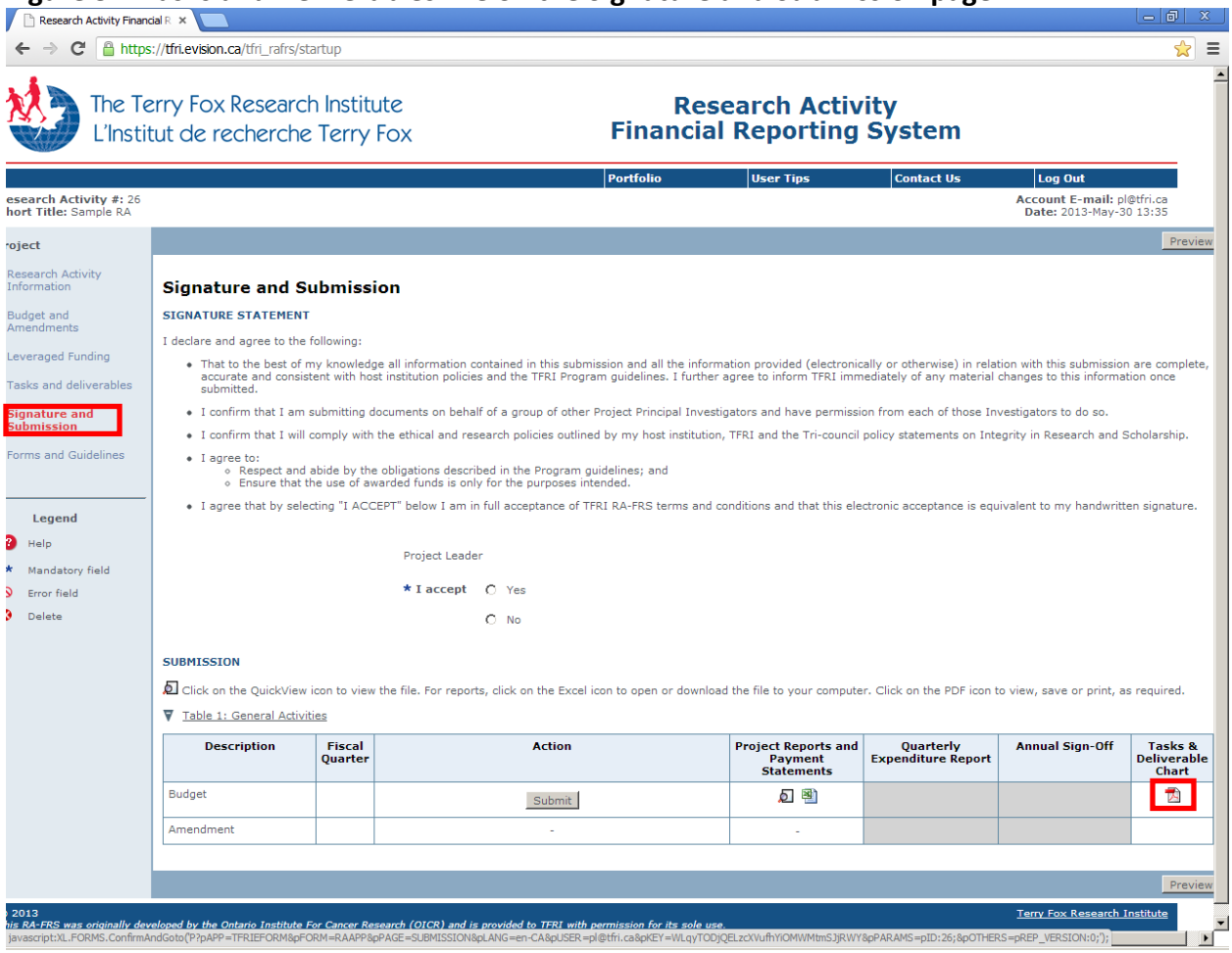
The Tasks and Deliverables file is also accessible on the **Signature and Submission** page.

Figure 51: Tasks and Deliverables File on the Signature and Submission page


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
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User Tips
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Account E-mail: pl@tfri.ca
Date: 2013-May-30 13:35
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Research Activity Information
Budget and Amendments
Leveraged Funding
Tasks and deliverables
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
Preview
Signature and Submission
SIGNATURE STATEMENT
I declare and agree to the following:
That to the best of my knowledge all information contained in this submission and all the information provided (electronically or otherwise) in relation with this submission are complete, accurate and consistent with host institution policies and the TFRI Program guidelines. I further agree to inform TFRI immediately of any material changes to this information once submitted.
I confirm that I am submitting documents on behalf of a group of other Project Principal Investigators and have permission from each of those Investigators to do so.
I confirm that I will comply with the ethical and research policies outlined by my host institution, TFRI and the Tri-council policy statements on Integrity in Research and Scholarship.
I agree to:
Respect and abide by the obligations described in the Program guidelines; and
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptance is equivalent to my handwritten signature.
Project Leader
* I accept
Yes
No
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on the PDF icon to view, save or print, as required.
Table 1: General Activities
Description
Fiscal Quarter
Action
Project Reports and Payment Statements
Quarterly Expenditure Report
Annual Sign-Off
Tasks & Deliverable Chart
Budget
Submit
Amendment
Preview
2013
his RA-FRS was originally developed by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
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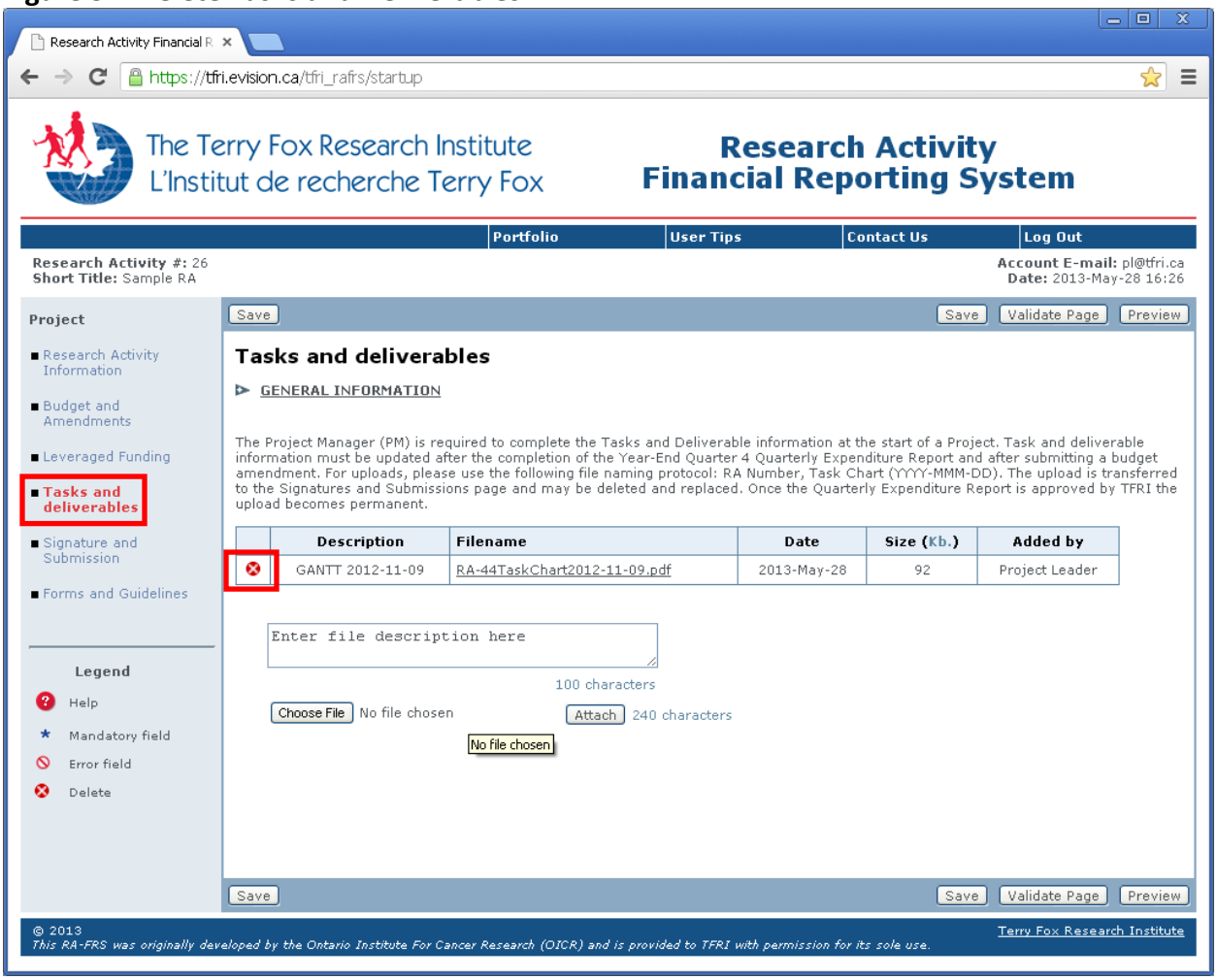
javascript:XL.FORMS.ConfirmAndGoto('P?pAPP=TFRIEFORM&pFORM=RAAPP&pPAGE=SUBMISSION&pLANG=en-CA&pUSER=pl@tfri.ca&pKEY=WLqyTODjQELzcXVufhYiOMWMtmSJRWY&pPARAMS=pID:26;&pOTHERS=pREP_VERSION:0;');

6.2. Replace the Tasks and Deliverables File

The most recent Tasks and Deliverables file may be replaced up until the next Quarterly Expenditure Report (QER) is approved by TFRI. Once the QER is approved, the most recent Tasks and Deliverables upload becomes “fixed” in the Signature and Submissions page with a date stamp and may be accessed at a later date.

To delete the Tasks and Deliverables file, simply press the red “x” button in the first column next to the file description, on the **Tasks and Deliverables** page.

Figure 52: Delete Tasks and Deliverables


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Research Activity
Financial Reporting System
Portfolio
User Tips
Contact Us
Log Out
Research Activity #: 26
Short Title: Sample RA
Account E-mail: pl@tfri.ca
Date: 2013-May-28 16:26
Project
Research Activity Information
Budget and Amendments
Leveraged Funding
Tasks and deliverables
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
Save
Validate Page
Preview
Tasks and deliverables
GENERAL INFORMATION
The Project Manager (PM) is required to complete the Tasks and Deliverable information at the start of a Project. Task and deliverable information must be updated after the completion of the Year-End Quarter 4 Quarterly Expenditure Report and after submitting a budget amendment. For uploads, please use the following file naming protocol: RA Number, Task Chart (YYYY-MMM-DD). The upload is transferred to the Signatures and Submissions page and may be deleted and replaced. Once the Quarterly Expenditure Report is approved by TFRI the upload becomes permanent.
Description
Filename
Date
Size (Kb.)
Added by
GANTT 2012-11-09
RA-44TaskChart2012-11-09.pdf
2013-May-28
92
Project Leader
Enter file description here
100 characters
Choose File
No file chosen
Attach
240 characters
No file chosen
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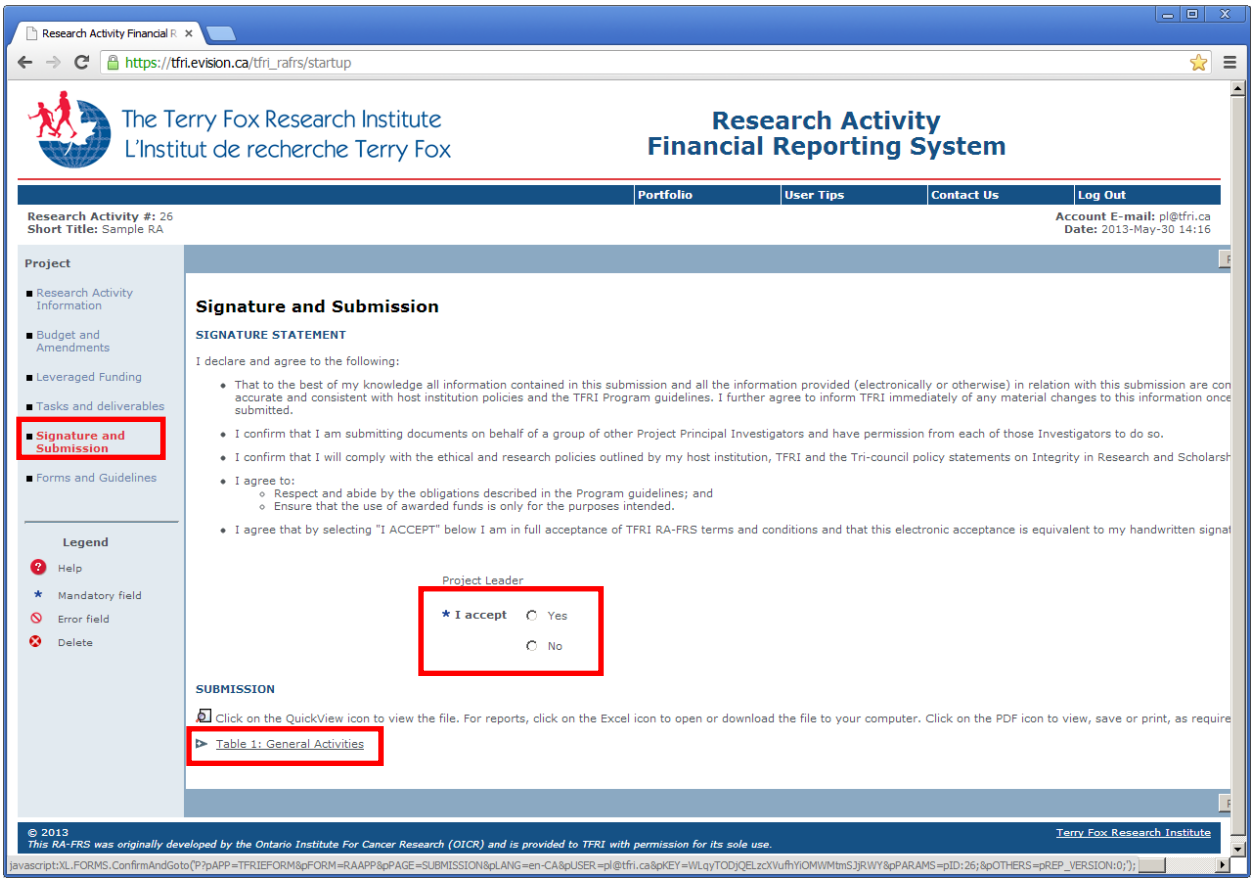
Tasks and Deliverables information must be updated annually and after budget amendments. Note that once the QER is approved, the most recent Tasks and Deliverables upload becomes permanent. All previous Tasks and Deliverables files will be available on the Signature and Submission page.

To replace the current file, simply upload an updated file on the Tasks and Deliverables page using the procedure described in **Section 6.1**. The new file will replace the previous file on the Tasks and Deliverables page. It will also be added to the Signature and Submission page where all previously uploaded/approved files are archived.

7. Submit the Budget and RA Information

Once the information in the Leveraged Funding, Budget and Tasks and Deliverables sections is complete, it is time to lock the budget and request that TFRI review the submission. To perform this step, access the **Signature and Submission** page using the left menu option. Review the Signature and Submission statement carefully and accept using the buttons underneath it. The Project Manager or Project Leader may do this, and it only needs to be done once for the RA.

Figure 53: Signature and Submission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https://tfri.evision.ca/tfri_rafrs/startup
The Terry Fox Research Institute
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Research Activity
Financial Reporting System
Portfolio
User Tips
Contact Us
Log Out
Research Activity #: 26
Short Title: Sample RA
Account E-mail: pl@tfri.ca
Date: 2013-May-30 14:16
Project
Research Activity Information
Budget and Amendments
Leveraged Funding
Tasks and deliverables
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
Signature and Submission
SIGNATURE STATEMENT
I declare and agree to the following:
That to the best of my knowledge all information contained in this submission and all the information provided (electronically or otherwise) in relation with this submission are con
accurate and consistent with host institution policies and the TFRI Program guidelines. I further agree to inform TFRI immediately of any material changes to this information once
submitted.
I confirm that I am submitting documents on behalf of a group of other Project Principal Investigators and have permission from each of those Investigators to do so.
I confirm that I will comply with the ethical and research policies outlined by my host institution, TFRI and the Tri-council policy statements on Integrity in Research and Scholarsh
I agree to:
Respect and abide by the obligations described in the Program guidelines; and
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptance is equivalent to my handwritten signat
Project Leader
* I accept
Yes
No
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on the PDF icon to view, save or print, as require
Table 1: General Activities
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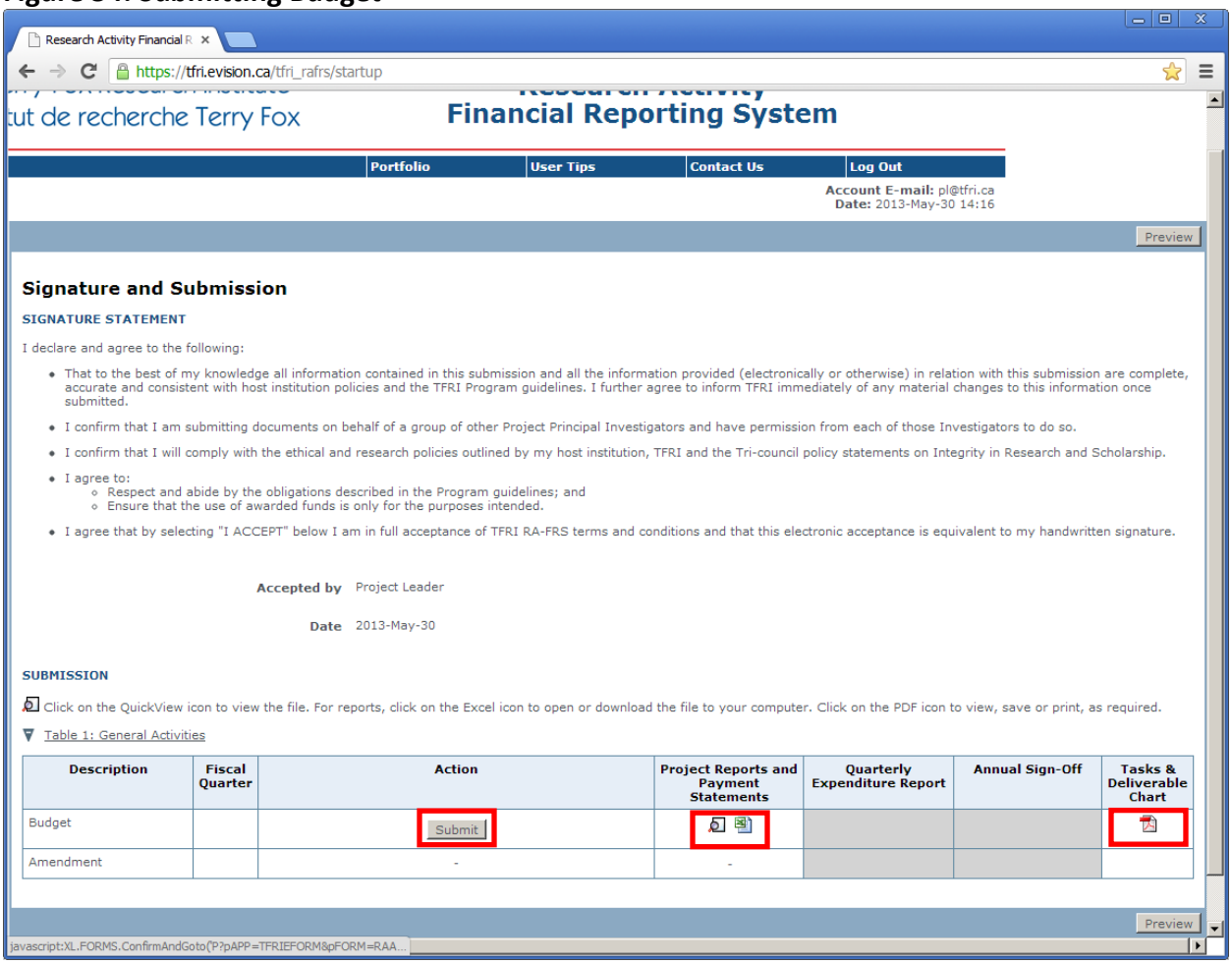
After accepting, click **Table 1: General Activities**. This will display the General Activities table. To display or hide this table, roll it up or down by clicking **Table 1: General Activities**. In this table, the Budget information is available in a Preview option or in Excel format, displayed in the **Project Reports and Payment Statements** column. The Tasks and Deliverables file is also available through a column of the same name (scroll to the right to see the whole table).

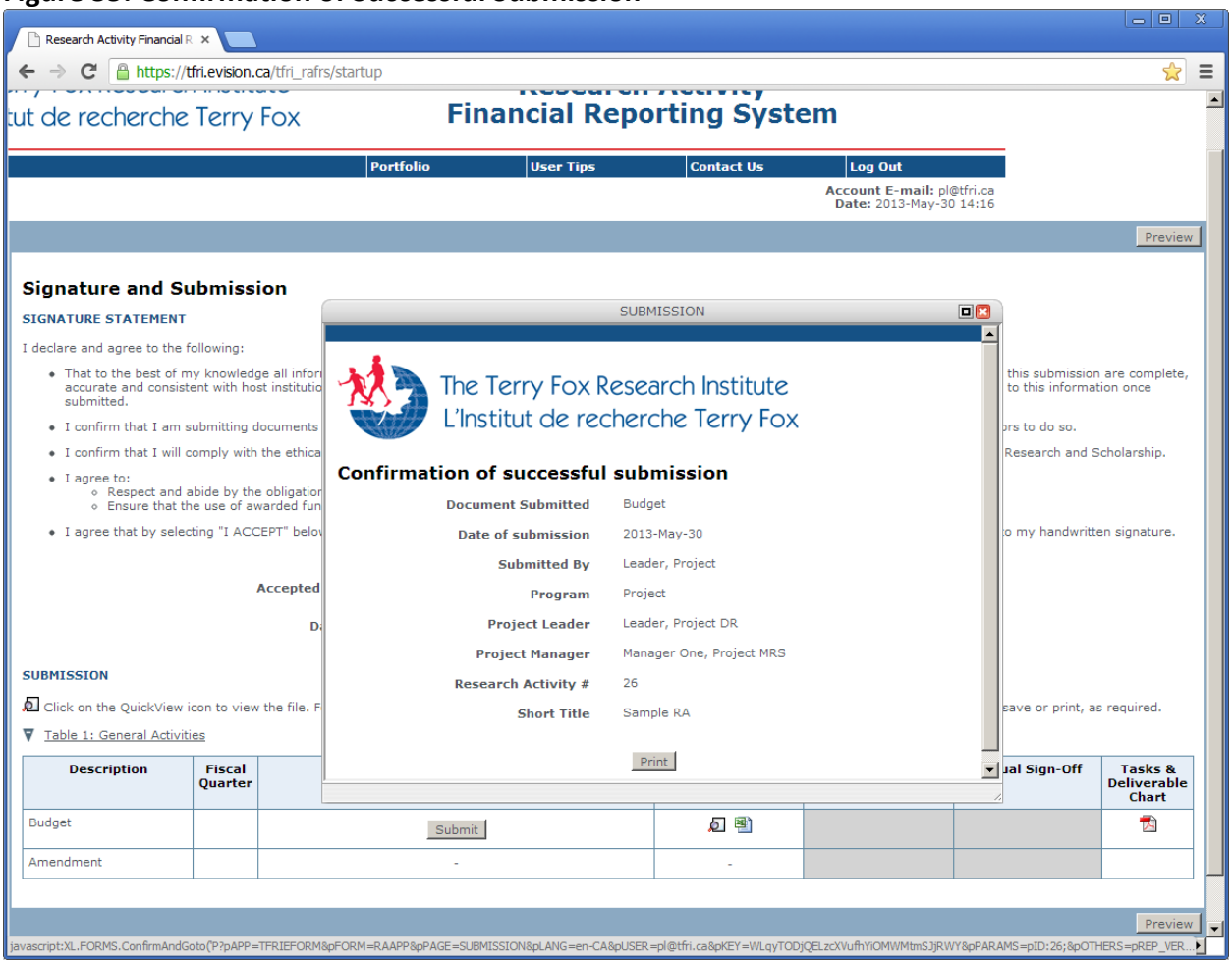
Click the **Submit** button located in the Budget row of the Submission table.

Figure 54: Submitting Budget


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
Financial Reporting System
Portfolio
User Tips
Contact Us
Log Out
Account E-mail: pl@tfri.ca
Date: 2013-May-30 14:16
Preview
Signature and Submission
SIGNATURE STATEMENT
I declare and agree to the following:
That to the best of my knowledge all information contained in this submission and all the information provided (electronically or otherwise) in relation with this submission are complete, accurate and consistent with host institution policies and the TFRI Program guidelines. I further agree to inform TFRI immediately of any material changes to this information once submitted.
I confirm that I am submitting documents on behalf of a group of other Project Principal Investigators and have permission from each of those Investigators to do so.
I confirm that I will comply with the ethical and research policies outlined by my host institution, TFRI and the Tri-council policy statements on Integrity in Research and Scholarship.
I agree to:
Respect and abide by the obligations described in the Program guidelines; and
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptance is equivalent to my handwritten signature.
Accepted by Project Leader
Date 2013-May-30
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on the PDF icon to view, save or print, as required.
Table 1: General Activities
Description
Fiscal Quarter
Action
Project Reports and Payment Statements
Quarterly Expenditure Report
Annual Sign-Off
Tasks & Deliverable Chart
Budget
Submit
Amendment
Preview

The system will ask for confirmation and then display a confirmation of successful submission for your reference. Afterward the submission date and submitter will be displayed in the Submission table.

Figure 55: Confirmation of Successful Submission



Once it has been submitted, TFRI will receive an email notification that the budget is ready to be reviewed. An email will be sent to the Project Leader and Project Manager when TFRI approves the budget.

Note! Email notifications may be suppressed on an account-level basis. To request this service, contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca

PART III: QUARTERLY REPORTING & MAINTENANCE ACTIVITIES

Part III of this guide describes activities that must be done periodically. This includes the Research Reporting and Quarterly Expenditure Reporting. In addition, Instalment and Reconciliation activities are required in order to track payments and create reports of cash received against expenditures.

8. Research Report

8.1. Prepare Research Report

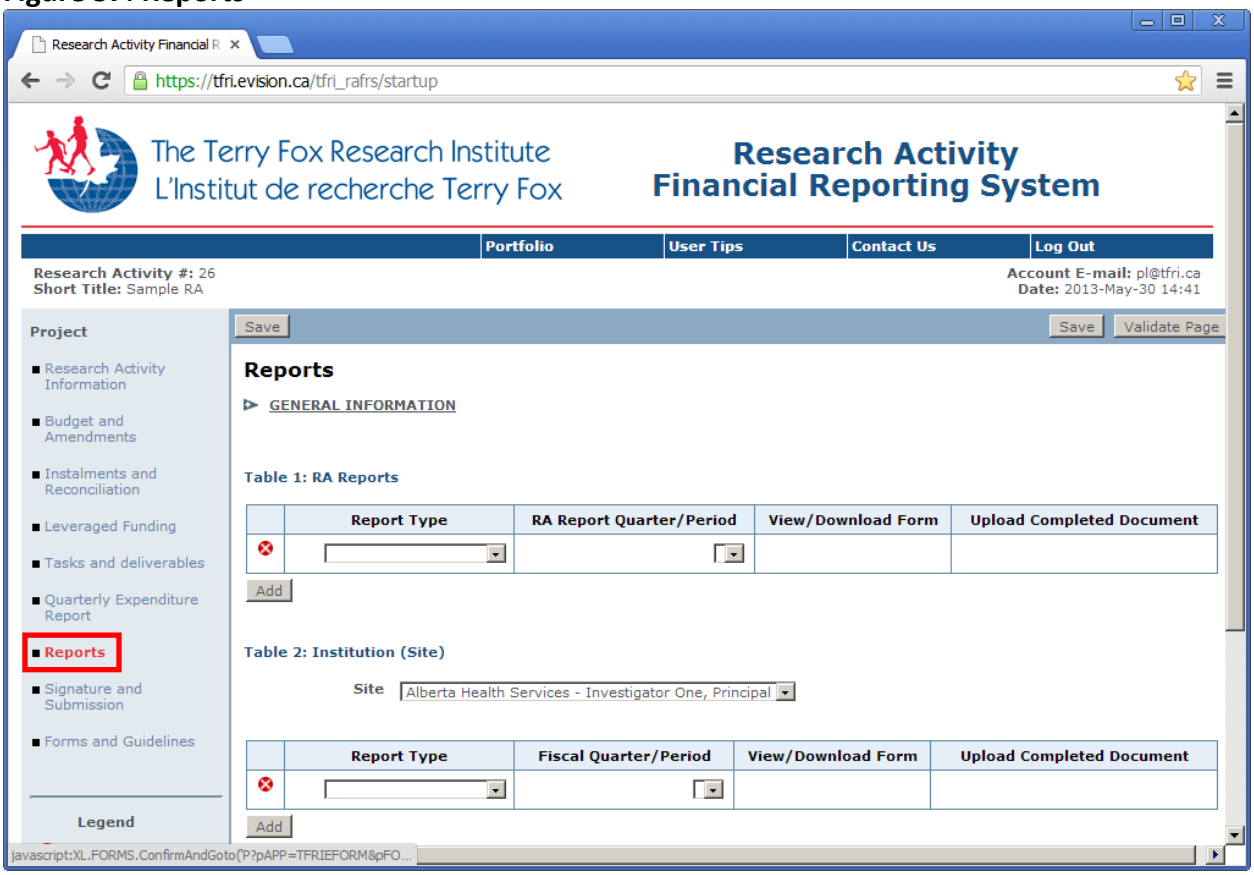
The Research Report is a report on progress using TFRI templates in Word format. Depending on the RA, you may be required to submit such a report quarterly, bi-annually or annually. The Project Leader or Project Manager is required to complete a Research Report 45 days after the period end (on a quarterly, bi-annual or annual basis). The period end is calculated from the RA start date. All due dates may be viewed after the budget is approved, in **Table 2: Research Reports** on the **Signature and Submission** page. A template for the Research Report can be downloaded from TFRI website or within the RA-FRS using the **Forms and Guidelines** left menu option.

Figure 56: Forms and Guidelines

8.2. Upload Research Report

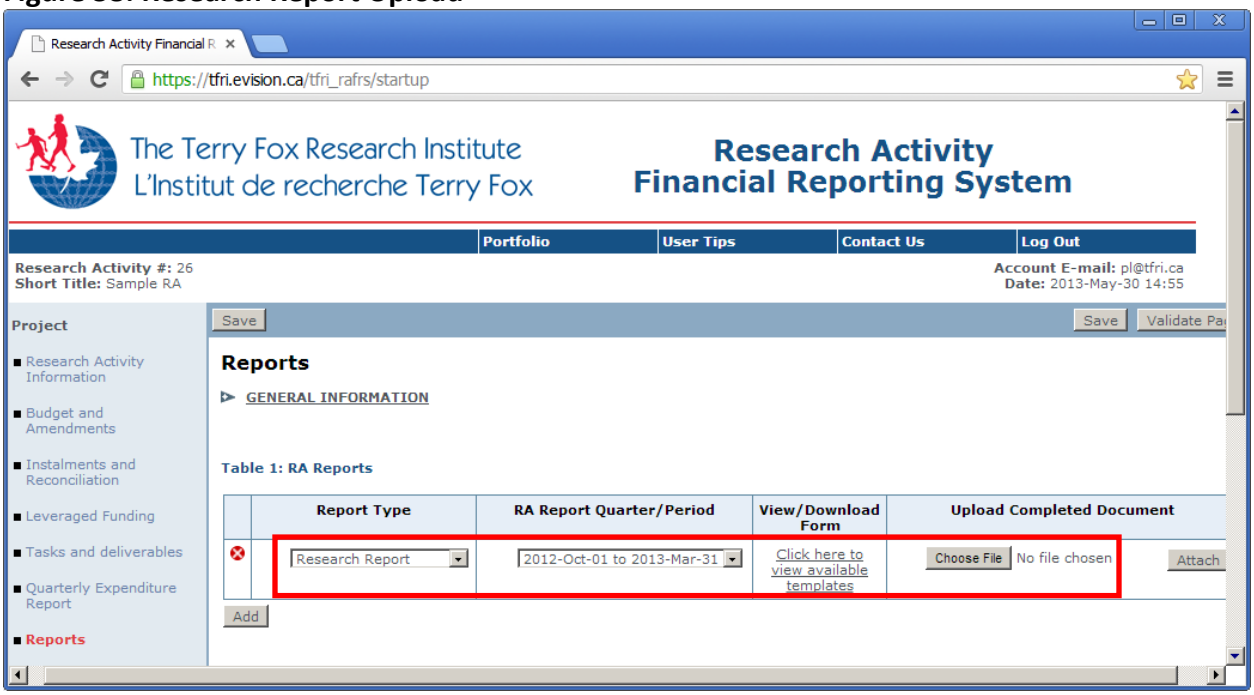
After the Research Report is prepared, it must be uploaded through the **Reports** page. The **Reports** page will only display on the left menu once TFRI has approved the budget. Click on the **Reports** option on the left menu.

Figure 57: Reports



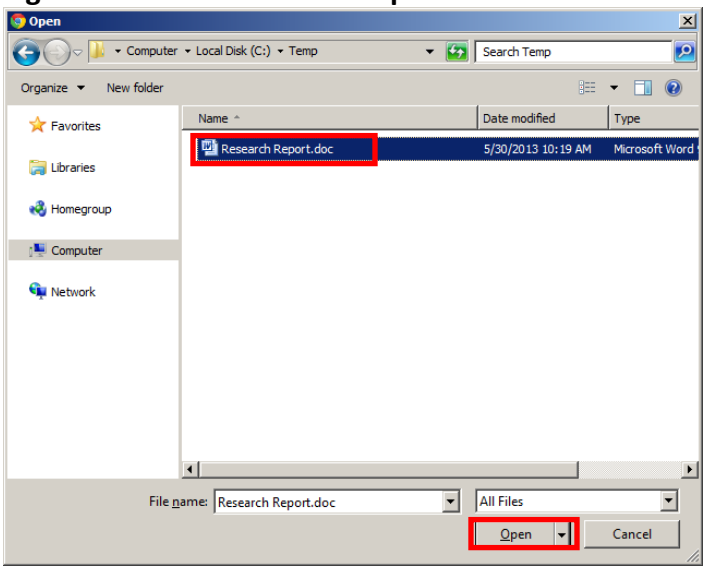
To upload the Research Report, go to **Table 1: RA Reports** and select the appropriate **Report Type** and **RA Report Quarter/Period** from the drop-down menus. If you click **View/Download Form**, it will take you to the templates available on the Forms and Guidelines page.

Figure 58: Research Report Upload



Click **Choose File**. Navigate to the file in your computer and click **Open**.

Figure 59: Select Research Report File



Once selected, click the **Attach** button in the RA-FRS Reports page. Important! You must then click **Save** after attaching in order for the document to be retained in the system.

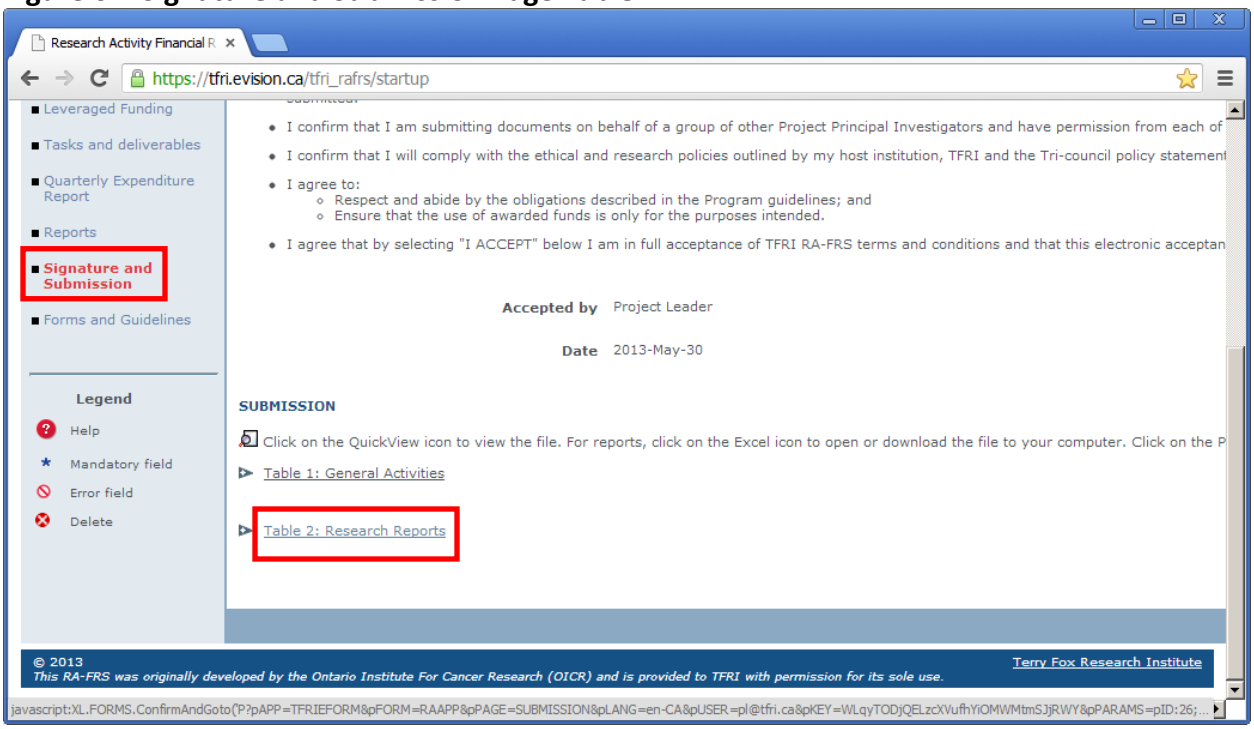
Figure 60: Attach Research Report File

If there are appendices or attachments to the Research Report, they may be uploaded separately by clicking **Add** below the table to insert more rows, and selecting the same RA Report Quarter/Period as the Research Report file. Files may be uploaded in doc,docx,pdf,ppt,pps, or txt format. Maximum file size for attachments is 5 megabytes. Remember to **Save** after attaching. After saving, all files attached will be available in the **Signature and Submission** page in the appropriate row for the period.

8.3. Submit Research Report

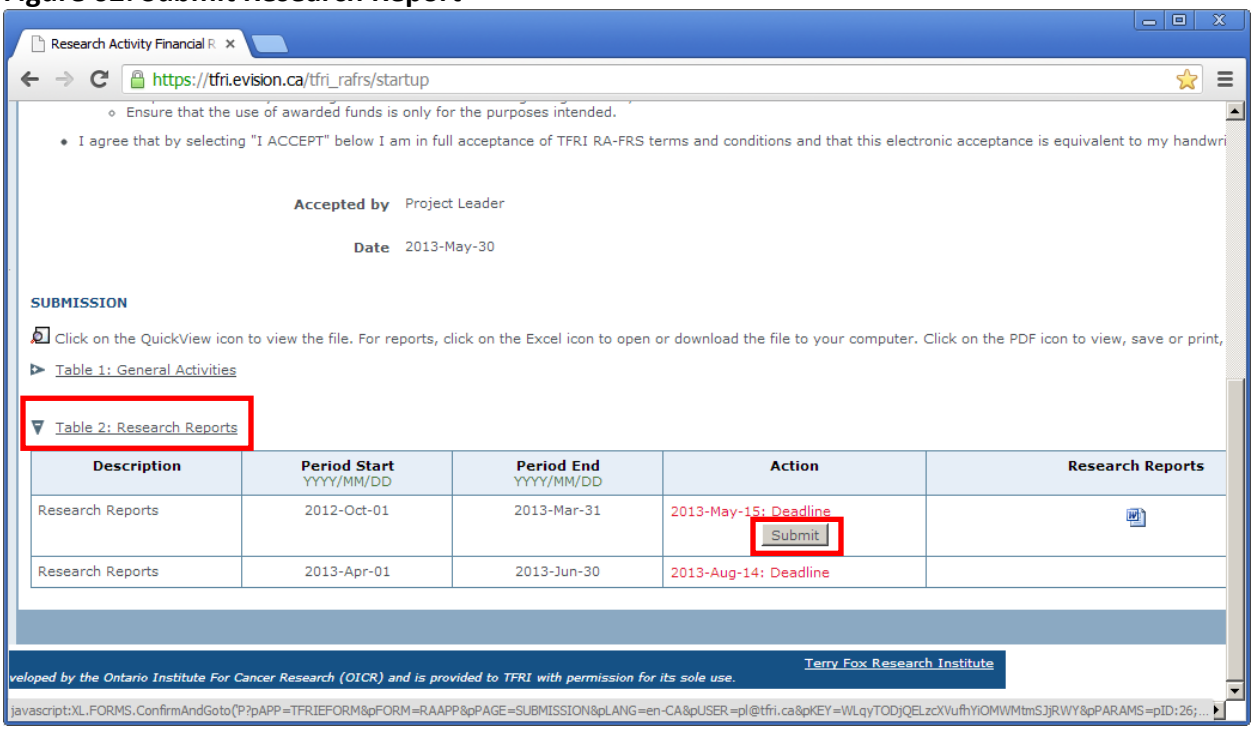
To submit the Research Report for TFRI review, go to the **Signature and Submission** page using the left menu. Scroll down the page to see the link for **Table 2: Research Reports**.

Figure 61: Signature and Submission Page Table 2


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
Leveraged Funding
Tasks and deliverables
Quarterly Expenditure Report
Reports
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
I confirm that I am submitting documents on behalf of a group of other Project Principal Investigators and have permission from each of
I confirm that I will comply with the ethical and research policies outlined by my host institution, TFRI and the Tri-council policy statement
I agree to:
Respect and abide by the obligations described in the Program guidelines; and
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptan
Accepted by Project Leader
Date 2013-May-30
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on the P
Table 1: General Activities
Table 2: Research Reports
© 2013
This RA-FRS was originally developed by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
Terry Fox Research Institute
javascript:XL.FORMS.ConfirmAndGoto('P?pAPP=TFRIEFORM&pFORM=RAAPP&pPAGE=SUBMISSION&pLANG=en-CA&pUSER=pl@tfri.ca&pKEY=WLqyTODjQELzcXVufhYiOMWMtmSJjRWY&pPARAMS=pID:26;...

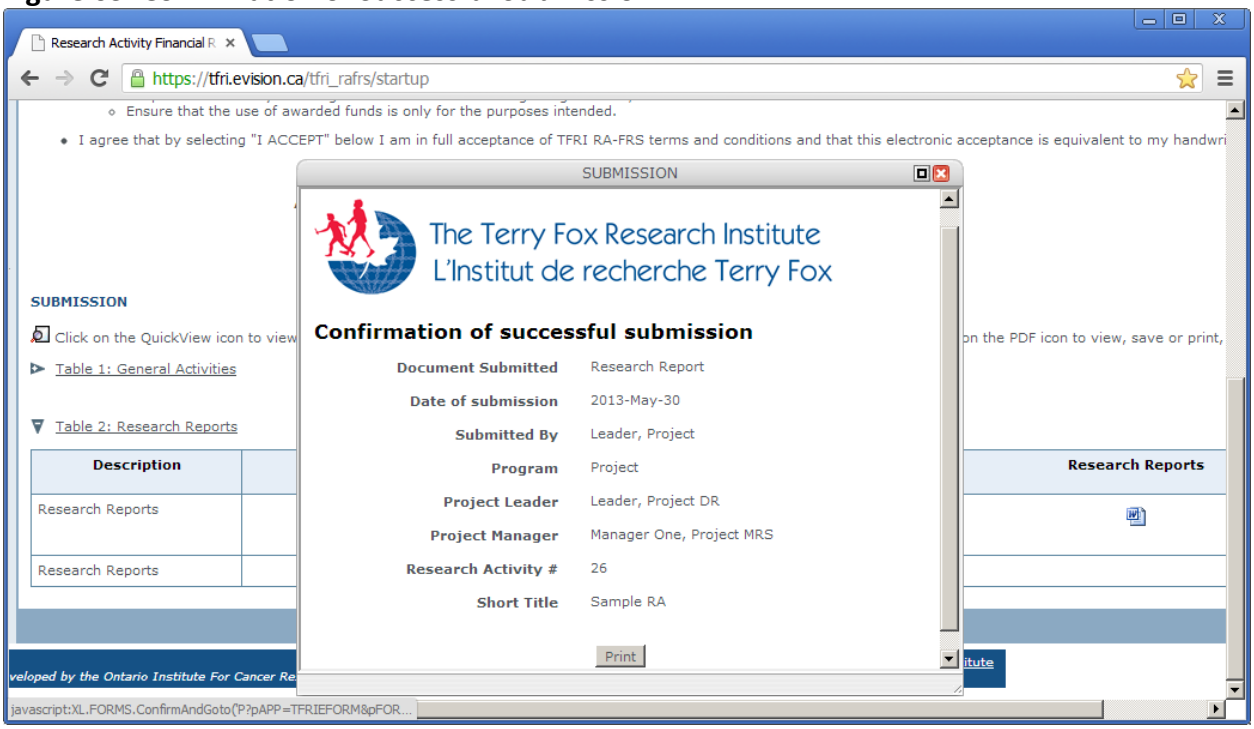
Click **Table 2: Research Reports** to display the table. Note that clicking it again will wrap the table up (hide it). The Research Report attached (and any additional files) will be able to be accessed in the **Research Report** column. Click **Submit** to submit the file(s).

Figure 62: Submit Research Report


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptance is equivalent to my handwri
Accepted by Project Leader
Date 2013-May-30
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on the PDF icon to view, save or print,
Table 1: General Activities
Table 2: Research Reports
Description
Period Start YYYY/MM/DD
Period End YYYY/MM/DD
Action
Research Reports
Research Reports
2012-Oct-01
2013-Mar-31
2013-May-15: Deadline
Submit
Research Reports
2013-Apr-01
2013-Jun-30
2013-Aug-14: Deadline
Terry Fox Research Institute
veloped by the Ontario Institute For Cancer Research (OICR) and is provided to TFRI with permission for its sole use.
javascript:XL.FORMS.ConfirmAndGoto('P?pAPP=TFRIEFORM&pFORM=RAAPP&pPAGE=SUBMISSION&pLANG=en-CA&pUSER=pl@tfri.ca&pKEY=WLqyTODjQELzcXVufhYiOMWMtmSJjRWY&pPARAMS=pID:26;...

The system will ask for confirmation and then display a confirmation of successful submission for your reference. Afterward the submission date and submitter will be displayed in the Submission table.

Figure 63: Confirmation of Successful Submission


Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
Ensure that the use of awarded funds is only for the purposes intended.
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic acceptance is equivalent to my handwri
SUBMISSION
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Confirmation of successful submission
Document Submitted Research Report
Date of submission 2013-May-30
Submitted By Leader, Project
Program Project
Project Leader Leader, Project DR
Project Manager Manager One, Project MRS
Research Activity # 26
Short Title Sample RA
Print
SUBMISSION
Click on the QuickView icon to view
on the PDF icon to view, save or print,
Table 1: General Activities
Table 2: Research Reports
Description
Research Reports
Research Reports
Research Reports
javascript:XL.FORMS.ConfirmAndGoto('P?pAPP=TFRIEFORM&pFOR...

Once it has been submitted, TFRI will receive an email notification that the Research Report has been submitted. An email will be sent to the Project Leader and Project Manager when TFRI acknowledges receipt.

Note! Email notifications may be suppressed on an account-level basis. To request this service, contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca

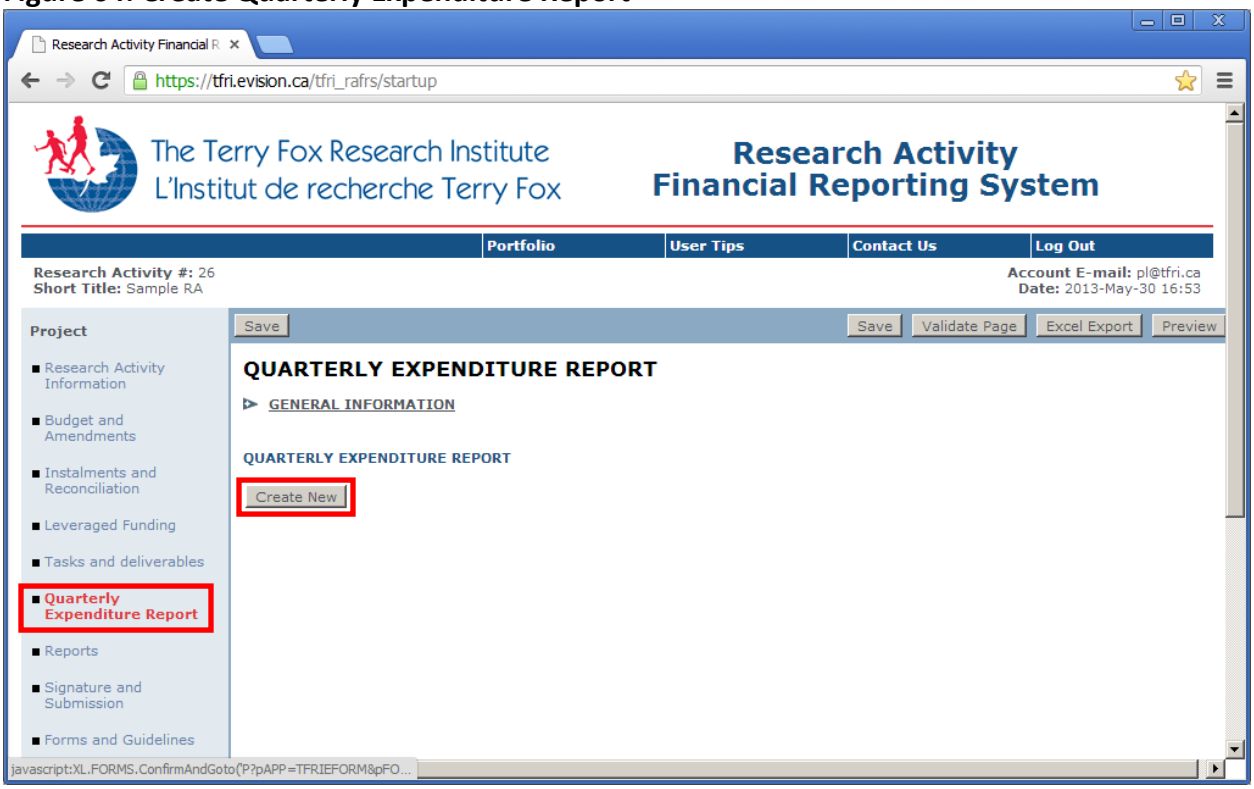
9. Quarterly Expenditure Report

Quarterly Expenditure Reports (QERs) are created to monitor expenditures on a quarterly basis. These are completed by the Financial Representative of each Institution. After the QER is filled in for all Sites, the Project Manager/Project Leader submits it on behalf of the RA. The QER is due 45 days past quarter end. A full list of due dates is available on the Signature and Submission page (Table 1: General Activities) after the budget is approved. Note that Financial Representatives do not have access to the Signature and Submission page. Only the Project Manager/Project Leader does.

9.1. Prepare the Quarterly Expenditure Report

In order for the Institution Financial Representatives to have access to the QER, the QER must be opened. The Project Manager or Project Leader must select **Quarterly Expenditure Report** from the left menu. The process begins when the **Create New** button is clicked.

Figure 64: Create Quarterly Expenditure Report



Once activated, the Project Manager/Project Leader will see a list of all projects within the RA. A Financial Representative will only see projects that are assigned to him/her.

To begin QER data entry, click **Quarterly expenditure report** next to the project name to open the project specific report.

Figure 65: Open Project Report

The page will refresh and reveal a list of six categories below the project name.

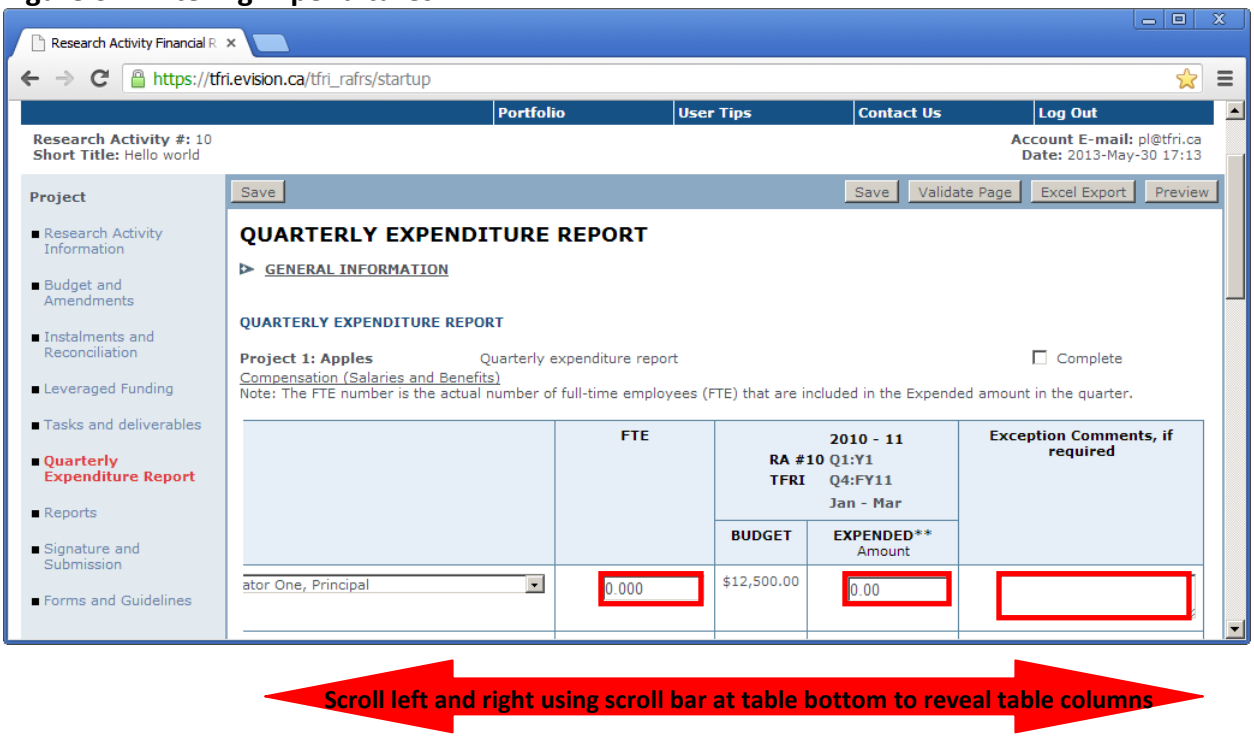
Figure 66: Expenditure Categories

Click on **Compensation (Salaries and Benefits)** to reveal the lines within this category. The Description, Site/PI, units and budget is pre-populated based on the approved budget. The **scroll bar at bottom of the table** must be used to view all columns. The column where expenses are to be entered is labeled in a few different ways. The example below is used to demonstrate how to read the column:

```
2010-11 = fiscal year range
Q1:Y1 = RA quarter : RA year
Q4:FY11 = fiscal quarter : fiscal year
Jan-Mar = calendar month period
```

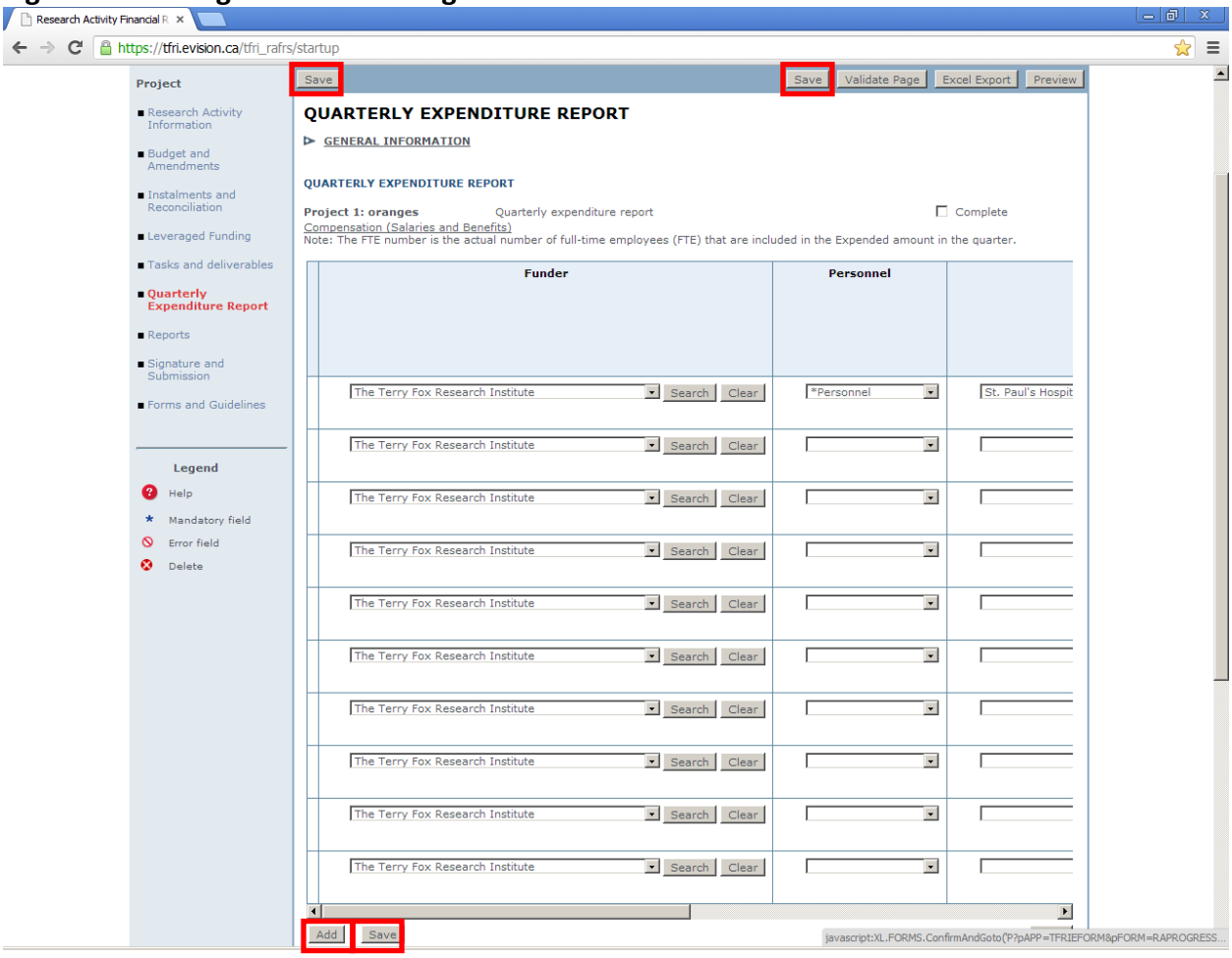
Enter the actual amount expended for the applicable quarter, including FTE/Units. Enter exception comments in the last column if applicable.

Figure 67: Entering Expenditures



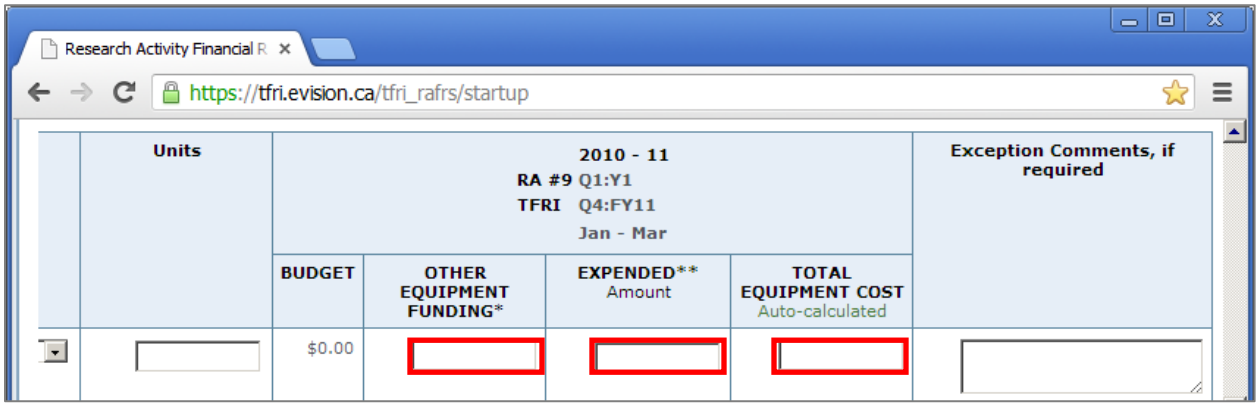
Continue this exercise with all remaining line items in this account for each expense category. Additional lines may be added to the table using the **Add** button at the bottom left of the table. Be sure to save before switching to another expense category. Save buttons are located at the top and bottom of each page. Repeat these steps for all projects assigned.

Figure 68: Adding Rows and Saving



For expense reporting for **Equipment**, there is a little more detail to fill in. In the Research Equipment expense category, after scrolling to the right using the scroll bar at the bottom of the table, you will see columns labeled **Other Equipment Funding**, **Expended Amount** and **Total Equipment Cost**. For **Other Equipment Funding**, enter contributions of other funders toward total cost of equipment. For **Expended Amount**, enter only the portion of the equipment covered by the Funder listed on that specific line. **The Total Equipment Cost** is auto-calculated. The **Total Equipment Cost** is reported in the Annual Sign-Off form at the end of the fiscal year.

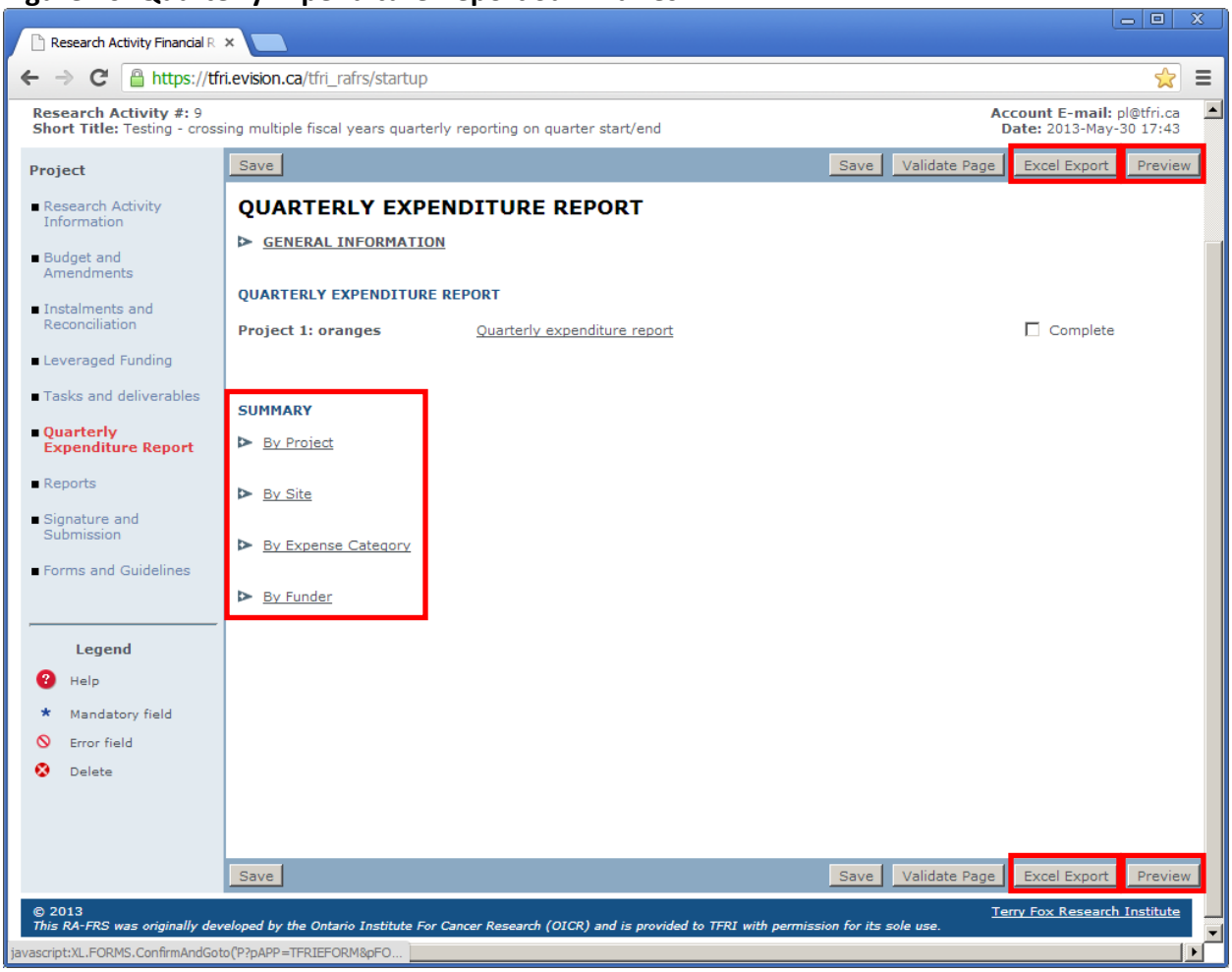
Figure 69: Research Equipment Expense Category



9.2. View Quarterly Expenditure Report Summaries

There are different ways to view the QER. Scroll down to the bottom of the **Quarterly Expenditure Report** page to see the **Summary** list. Click on any of these links to see the QER displayed in a variety of ways. In addition, at the top and bottom at right of the screen, there are buttons for **Excel Export** and **Preview** that are helpful when viewing the QER. Note that the system does not support the printing of reports while in **Preview** mode. To print a summary, click the **Excel Export** button and print the file through Excel after formatting.

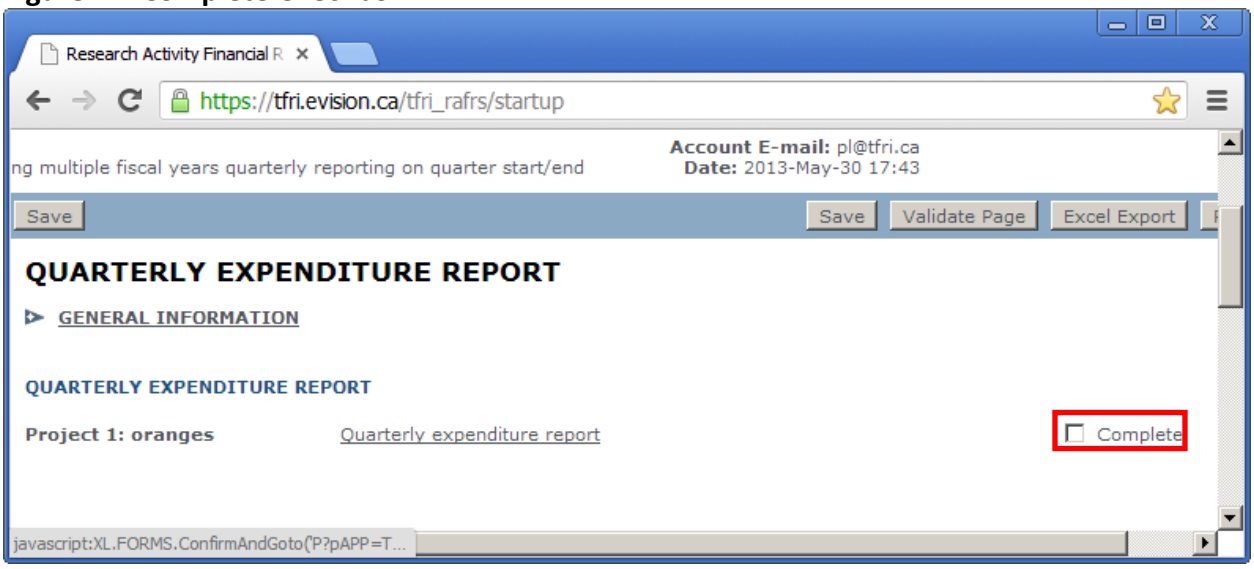
Figure 70: Quarterly Expenditure Report Summaries



9.3. Submit the Quarterly Expenditure Report

When all expenses have been entered, the Project Manager/Project Leader locks the entries by clicking the **Complete** checkbox for each project. This checkbox is located to the right of each project name. A Financial Representative will be able to view the complete/incomplete status for their project but the checkbox will not be shown. The Project Manager/Project Leader may also uncheck the Complete checkbox if necessary.

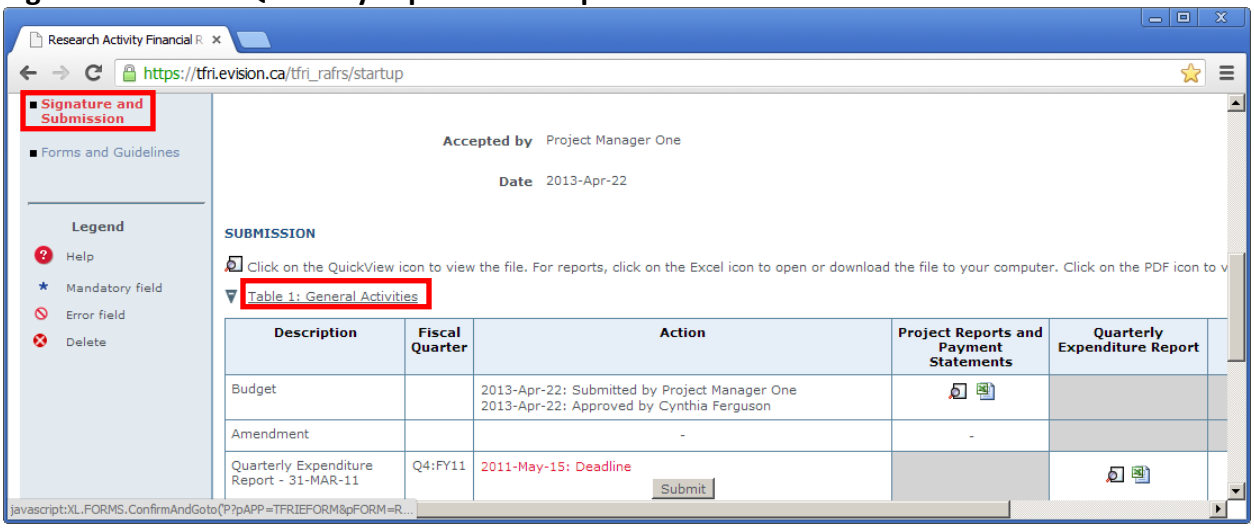
Figure 71: Complete Checkbox



After the **Complete** checkbox has been checked, the Project Manager/Project Leader must go to the **Signature and Submission** page using the left hand menu. Financial representatives will not have this option displayed on their screen.

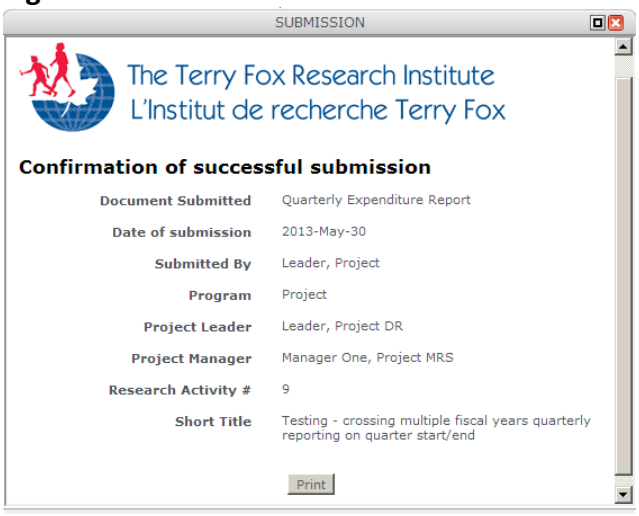
While on the **Signature and Submission** page, click **Table 1: General Activities**. A row for the QER will be evident. In this table, the QER details are available in a Preview option or in Excel format, displayed in the **Quarterly Expenditure Report** column. Click the **Submit** button located in the QER row of the Submission table.

Figure 72: Submit Quarterly Expenditure Report



The system will ask for confirmation and then display a confirmation of successful submission for your reference. Afterward the submission date and submitter will be displayed in the Submission table.

Figure 73: Confirmation of Successful Submission


SUBMISSION
The Terry Fox Research Institute
L'Institut de recherche Terry Fox
Confirmation of successful submission
Document Submitted Quarterly Expenditure Report
Date of submission 2013-May-30
Submitted By Leader, Project
Program Project
Project Leader Leader, Project DR
Project Manager Manager One, Project MRS
Research Activity # 9
Short Title Testing - crossing multiple fiscal years quarterly reporting on quarter start/end
Print

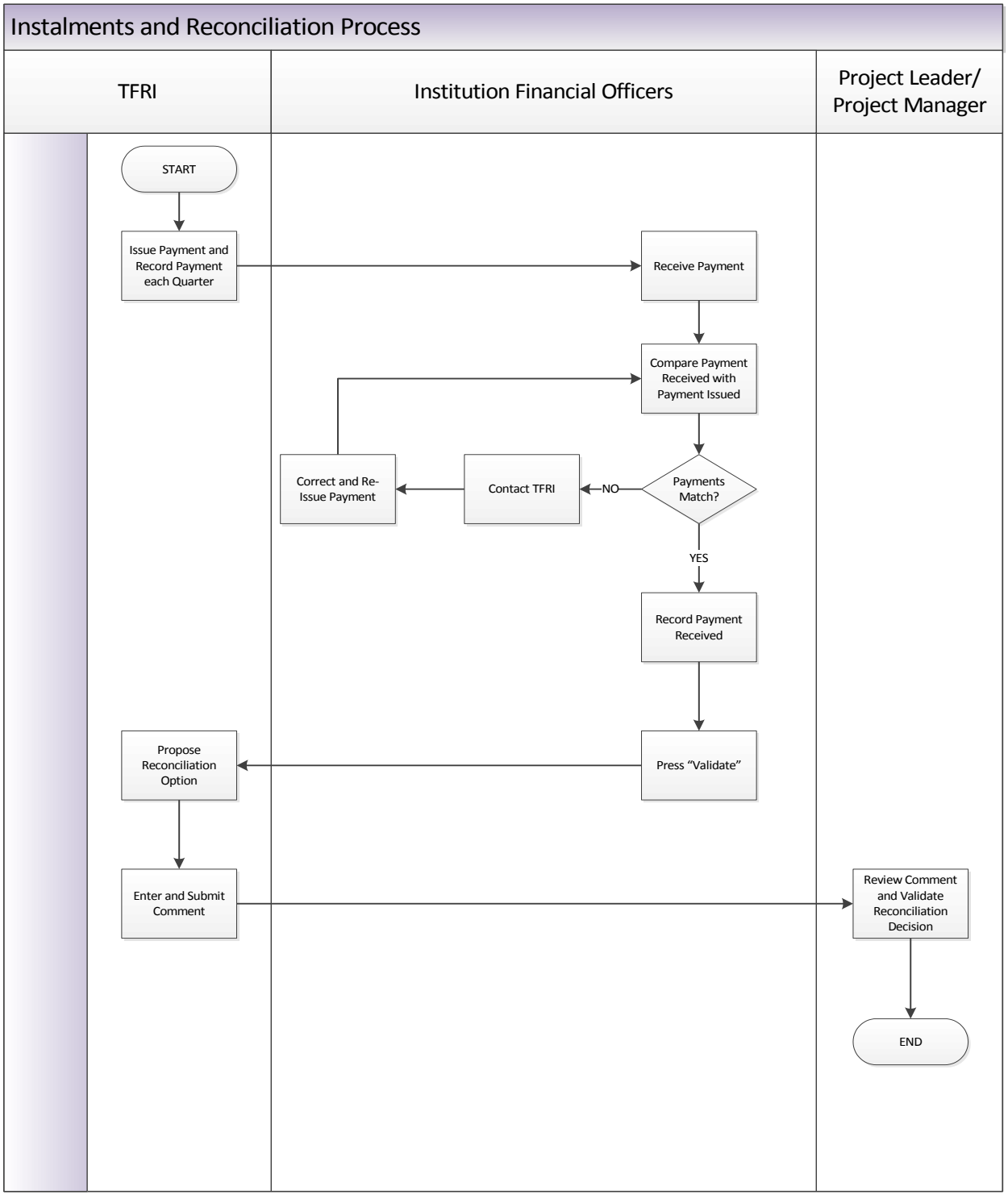
10. Instalments and Reconciliation

The instalments and reconciliation are done on a quarterly basis. This module becomes active after the budget has been approved by TFRI. The **Instalments and Reconciliation** module has several key functions:

- Record and validate instalments received by sites
- Monitor expenditures
- Communicate decisions regarding reconciliation activities

The following flow chart illustrates the steps involved in this process and the timing of each step. Each step is explained in detail in this section.

Figure 74: Instalment and Reconciliation Process

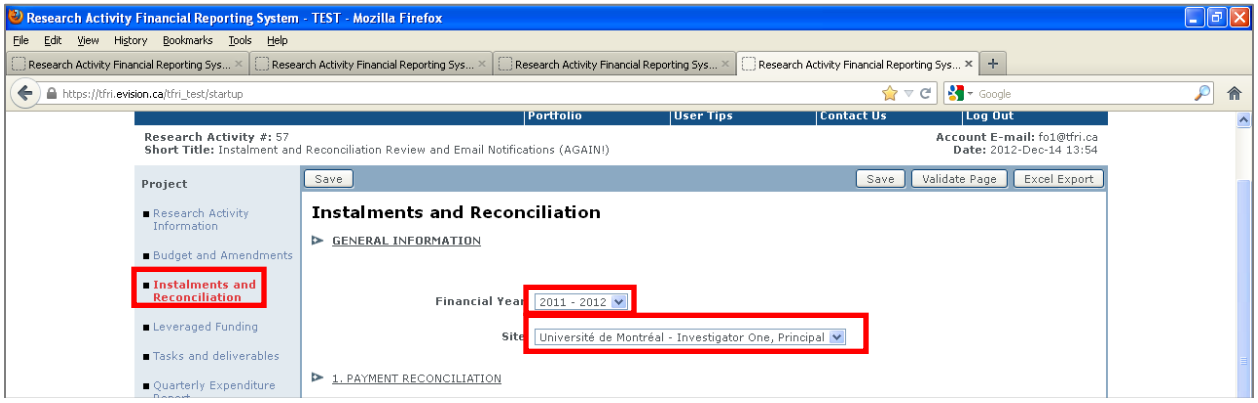


10.1. Enter Instalments and Reconciliation Information

To begin, click **Instalments and Reconciliation** from the left menu.

For financial representatives who manage more than one PI, the Site drop-down box allows them to toggle between investigators. The same drop-down box allows Project Managers/Project Leaders to toggle between Sites/PIs. The Financial Year drop-down list allows toggling between fiscal years. If a particular PI has budget within more than one project in a RA, the Instalments and Reconciliation and Annual Sign-Off combine all payments and expenditures for the fiscal year for that PI.

Figure 75: Instalments and Reconciliation

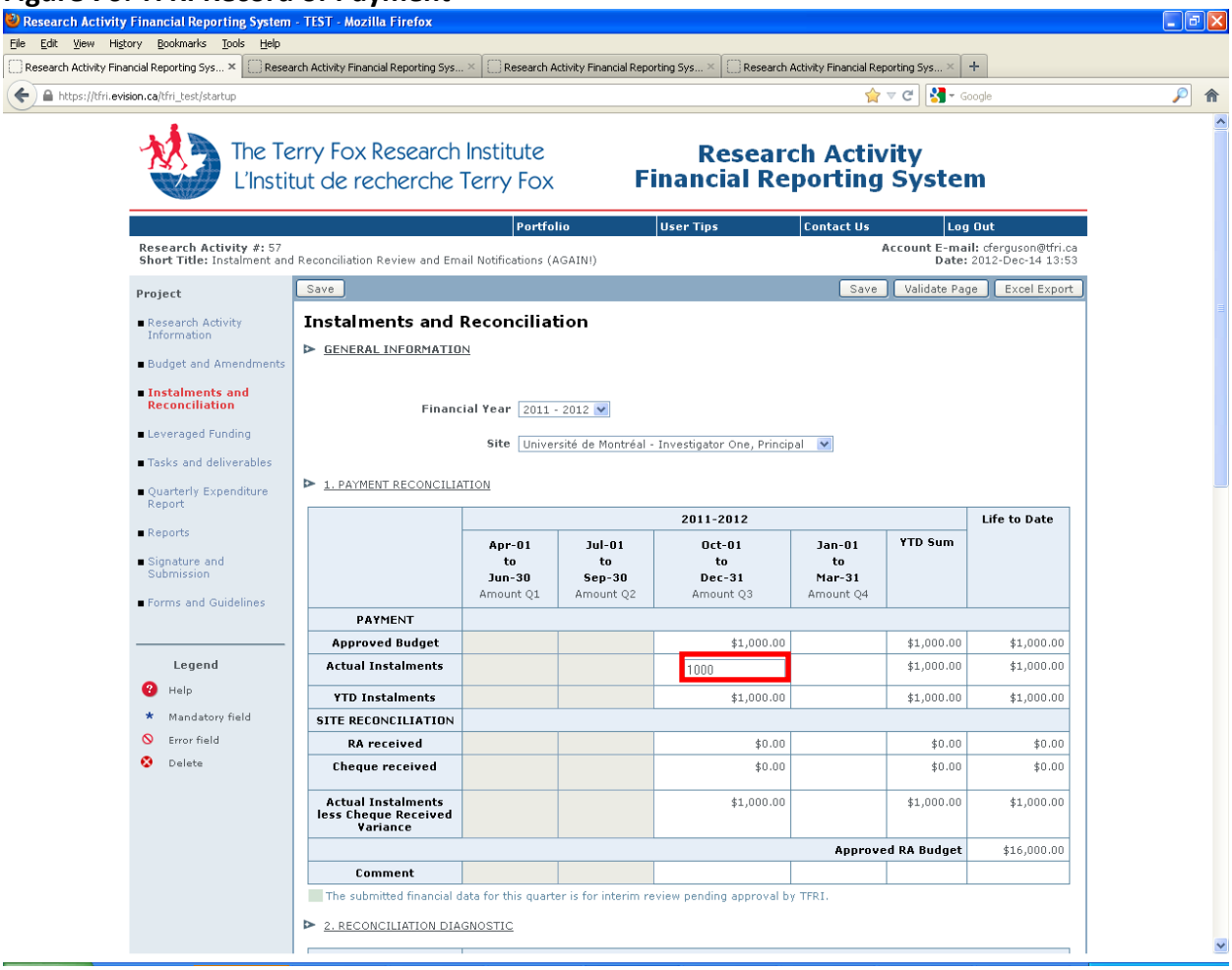


A general description of timing may be helpful. TFRI and the Financial Representative may do the payment entry anytime during the current quarter, but TFRI will not be able to select reconciliation options until the QER is submitted and approved. This means that TFRI can enter the cheque amount when it is sent and the Financial Representative can enter cheque amounts received at the same time they are entering expenses in the QER for that quarter. Note: If the Financial Representative enters amount received in before TFRI enters amount sent, the Financial Representative will have to wait until the TFRI value is displayed until he/she can validate the number. In the normal flow of a quarter, TFRI should have entered cheque amount in by the time the project is preparing its QER.

There are four main steps to this process, outlined on the following pages.

Step 1: TFRI records payment and saves

Figure 76: TFRI Record of Payment

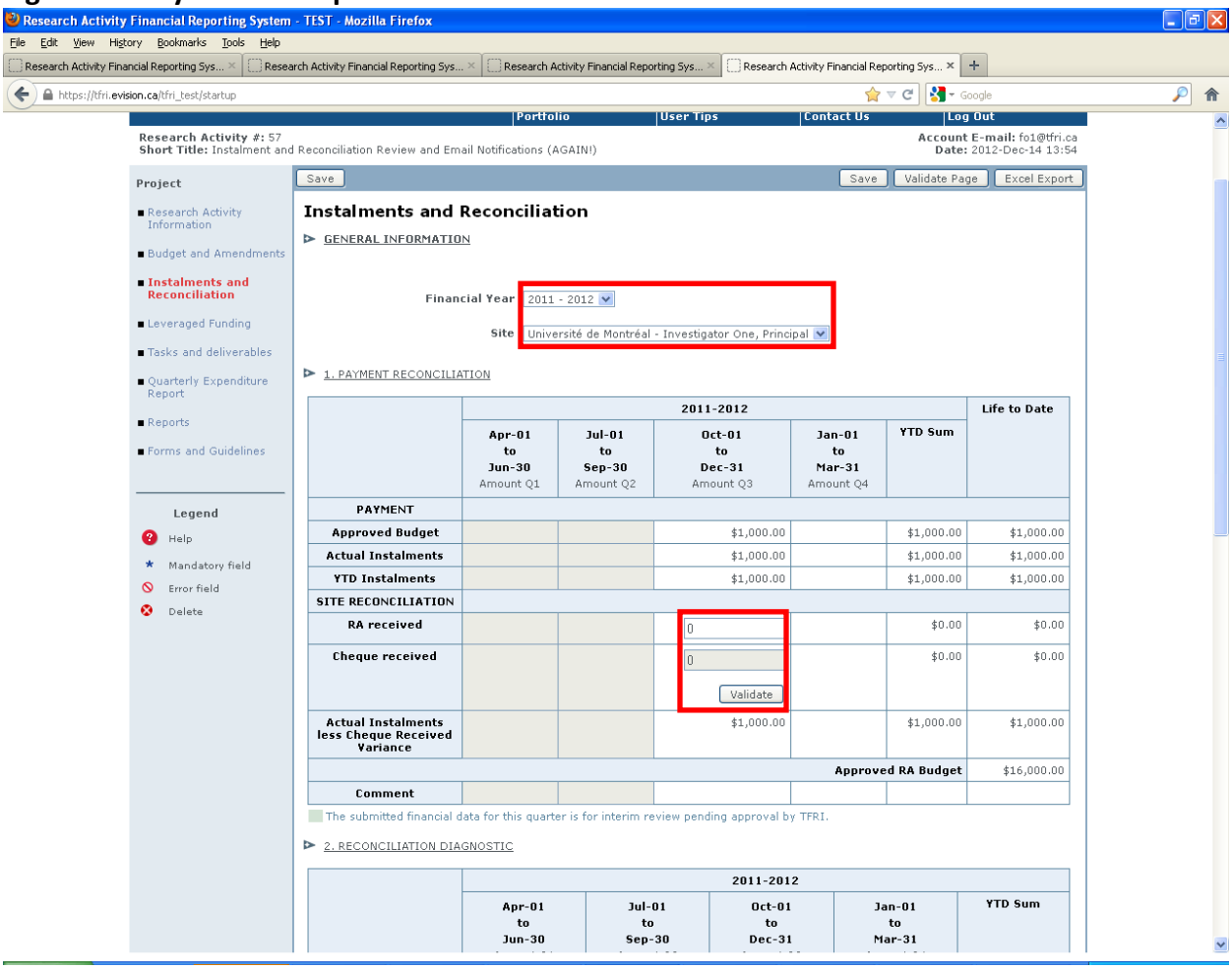


Step 2: The Financial Representative enters payment received and clicks Validate

(note, "RA received" is filled in and "Cheque received" is auto-populated. The values should be equal).

Select the appropriate **Financial Year** and **Site** from the drop-down menus indicated. After the **Validate** button is clicked, the screen will show a date-stamped record of who validated the record. Note: If the Financial Representative enters amount received in before TFRI enters amount sent, the Financial Representative will have to wait until the TFRI value is displayed until he/she can validate the number.

Figure 77: Payment Receipt Recorded



Step 3: TFRI proposes a reconciliation option

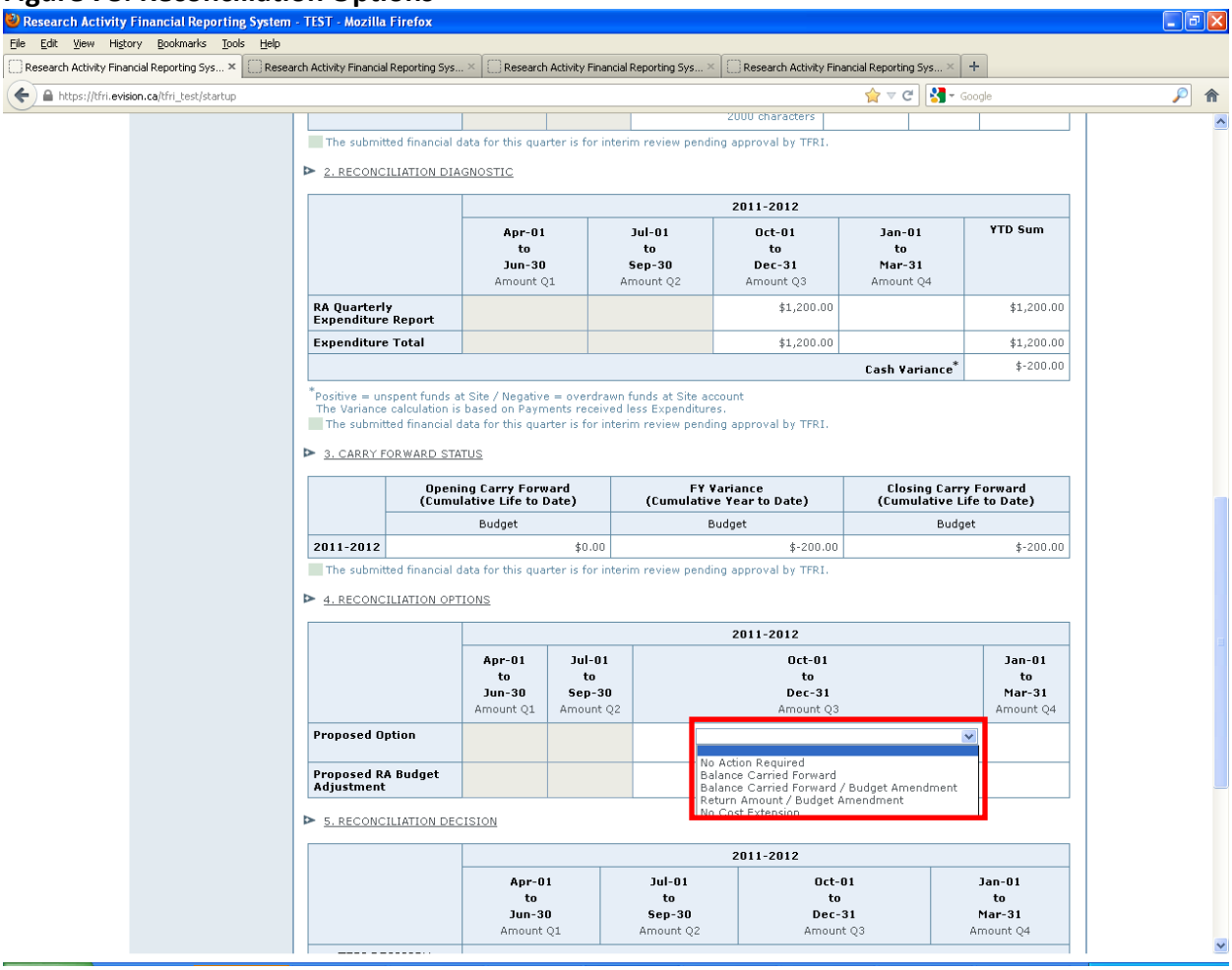
TFRI will not be able to select reconciliation options until the QER is submitted and approved.

Possible options TFRI may choose are:

- No action required
- Balance carried forward
- Balance carried forward/budget amendment
- Return amount/budget amendment
- No cost extension

Only one option may be chosen.

Figure 78: Reconciliation Options


Research Activity Financial Reporting System - TEST - Mozilla Firefox
The submitted financial data for this quarter is for interim review pending approval by TFRI.
2. RECONCILIATION DIAGNOSTIC
2011-2012
Apr-01 to Jun-30 Amount Q1
Jul-01 to Sep-30 Amount Q2
Oct-01 to Dec-31 Amount Q3
Jan-01 to Mar-31 Amount Q4
YTD Sum
RA Quarterly Expenditure Report
$1,200.00
$1,200.00
Expenditure Total
$1,200.00
$1,200.00
Cash Variance*
$-200.00
*Positive = unspent funds at Site / Negative = overdrawn funds at Site account
The Variance calculation is based on Payments received less Expenditures.
The submitted financial data for this quarter is for interim review pending approval by TFRI.
3. CARRY FORWARD STATUS
Opening Carry Forward (Cumulative Life to Date)
FY Variance (Cumulative Year to Date)
Closing Carry Forward (Cumulative Life to Date)
Budget
2011-2012
$0.00
$-200.00
$-200.00
The submitted financial data for this quarter is for interim review pending approval by TFRI.
4. RECONCILIATION OPTIONS
2011-2012
Proposed Option
Proposed RA Budget Adjustment
No Action Required
Balance Carried Forward
Balance Carried Forward / Budget Amendment
Return Amount / Budget Amendment
No Cost Extension
5. RECONCILIATION DECISION
2011-2012

At this point the Project Manager or Project Leader can also enter a comment near the bottom of the screen but cannot click the **Approve** button until TFRI selects the reconciliation option and approves. To save the comment that you have entered, click **Save**. Once TFRI approves, the Project Manager and Project Leader receive an email notification. All comments are time stamped with the name of the user who approved.

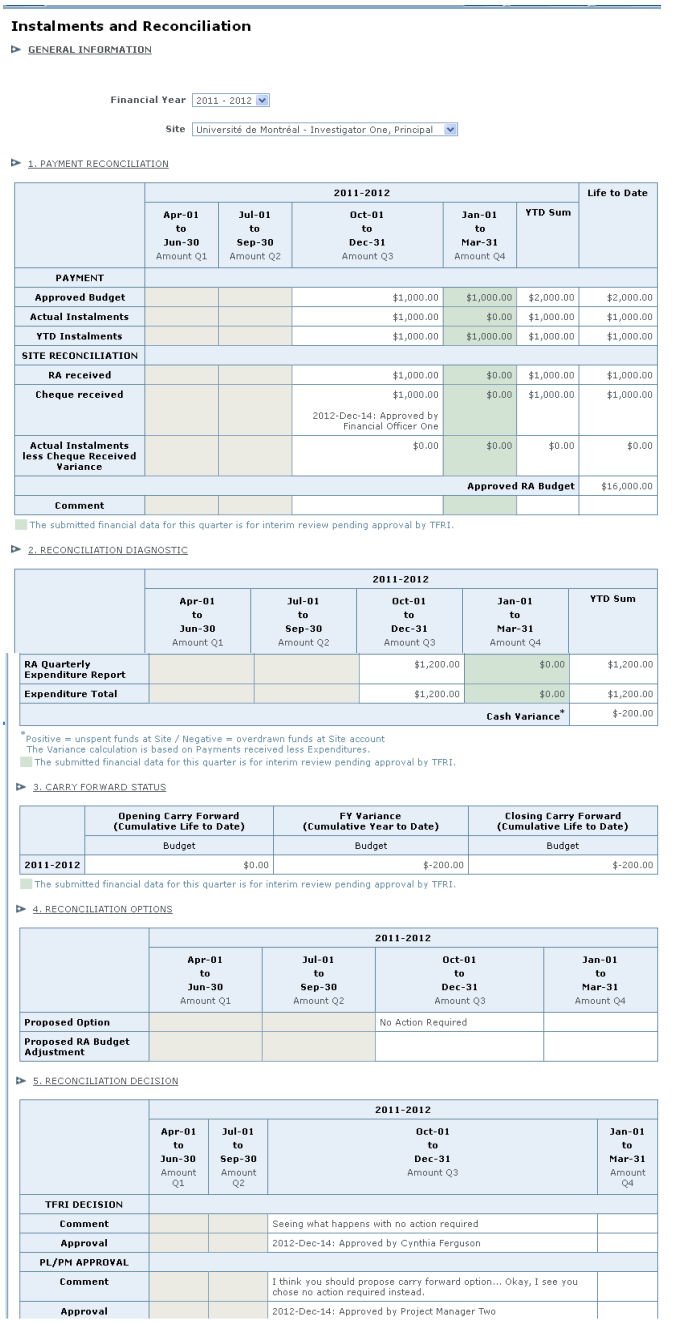
Step 4: The Project Manager or Project Leader may enter a comment and clicks Approve

The comment is optional, and if they entered a comment earlier in the process, they can add to/change it before approving.

Once the Project Manager or Project Leader approves, an email notification is sent to TFRI.

When this is all done, the next quarter is shaded green and comments and approval dates are displayed.

Figure 79: Completed Instalments and Reconciliation



Instalments and Reconciliation

GENERAL INFORMATION

Financial Year: 2011 - 2012

Site: Université de Montréal - Investigator One, Principal

1. PAYMENT RECONCILIATION

	2011-2012					Life to Date
	Apr-01 to Jun-30 Amount Q1	Jul-01 to Sep-30 Amount Q2	Oct-01 to Dec-31 Amount Q3	Jan-01 to Mar-31 Amount Q4	YTD Sum	
PAYMENT						
Approved Budget			$1,000.00	$1,000.00	$2,000.00	$2,000.00
Actual Instalments			$1,000.00	$0.00	$1,000.00	$1,000.00
YTD Instalments			$1,000.00	$1,000.00	$1,000.00	$1,000.00
SITE RECONCILIATION						
RA received			$1,000.00	$0.00	$1,000.00	$1,000.00
Cheque received			$1,000.00 2012-Dec-14: Approved by Financial Officer One	$0.00	$1,000.00	$1,000.00
Actual Instalments less Cheque Received Variance			$0.00	$0.00	$0.00	$0.00
					Approved RA Budget	$16,000.00
Comment						

The submitted financial data for this quarter is for interim review pending approval by TFRI.

2. RECONCILIATION DIAGNOSTIC

	2011-2012				
	Apr-01 to Jun-30 Amount Q1	Jul-01 to Sep-30 Amount Q2	Oct-01 to Dec-31 Amount Q3	Jan-01 to Mar-31 Amount Q4	YTD Sum
RA Quarterly Expenditure Report			$1,200.00	$0.00	$1,200.00
Expenditure Total			$1,200.00	$0.00	$1,200.00
				Cash Variance*	$-200.00

*Positive = unspent funds at Site / Negative = overdrawn funds at Site account
The Variance calculation is based on Payments received less Expenditures.
The submitted financial data for this quarter is for interim review pending approval by TFRI.

3. CARRY FORWARD STATUS

	Opening Carry Forward (Cumulative Life to Date)	FY Variance (Cumulative Year to Date)	Closing Carry Forward (Cumulative Life to Date)
	Budget	Budget	Budget
2011-2012	$0.00	$-200.00	$-200.00

The submitted financial data for this quarter is for interim review pending approval by TFRI.

4. RECONCILIATION OPTIONS

	2011-2012			
	Apr-01 to Jun-30 Amount Q1	Jul-01 to Sep-30 Amount Q2	Oct-01 to Dec-31 Amount Q3	Jan-01 to Mar-31 Amount Q4
Proposed Option			No Action Required	
Proposed RA Budget Adjustment				

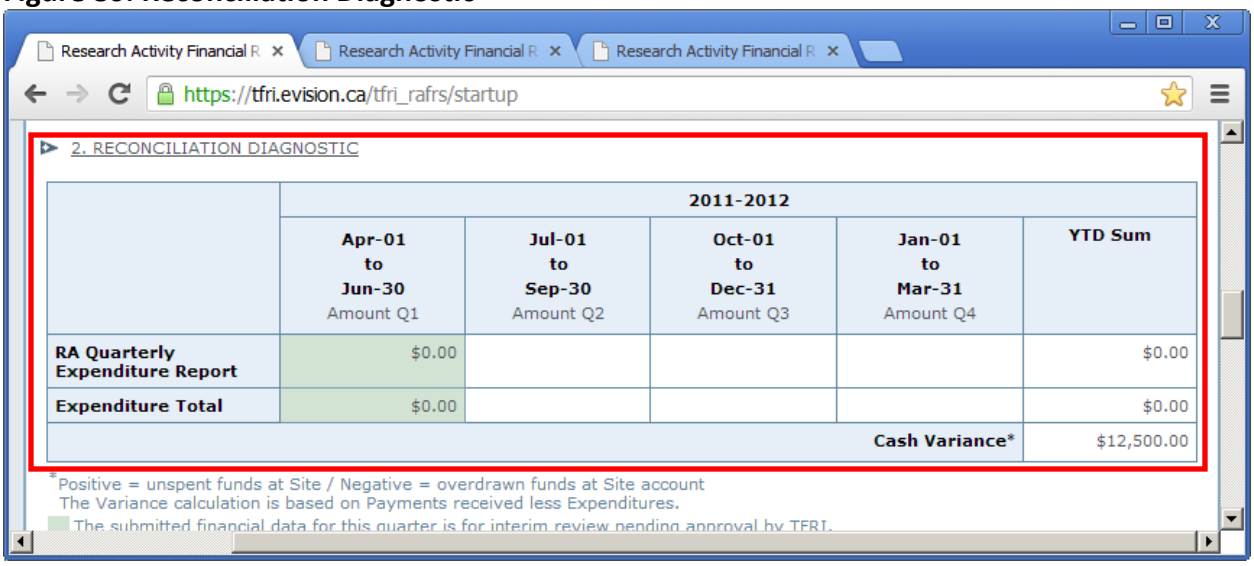
5. RECONCILIATION DECISION

	2011-2012			
	Apr-01 to Jun-30 Amount Q1	Jul-01 to Sep-30 Amount Q2	Oct-01 to Dec-31 Amount Q3	Jan-01 to Mar-31 Amount Q4
TFRI DECISION				
Comment			Seeing what happens with no action required	
Approval			2012-Dec-14: Approved by Cynthia Ferguson	
PL/PM APPROVAL				
Comment			I think you should propose carry forward option... Okay, I see you chose no action required instead.	
Approval			2012-Dec-14: Approved by Project Manager Two	

10.2. View Reconciliation Diagnostic

The reconciliation diagnostic captures what was spent during the quarter and the year to date (YTD) sum. Financial data is transferred to the reconciliation diagnostic automatically as TFRI approves each Quarterly Expenditure Report.

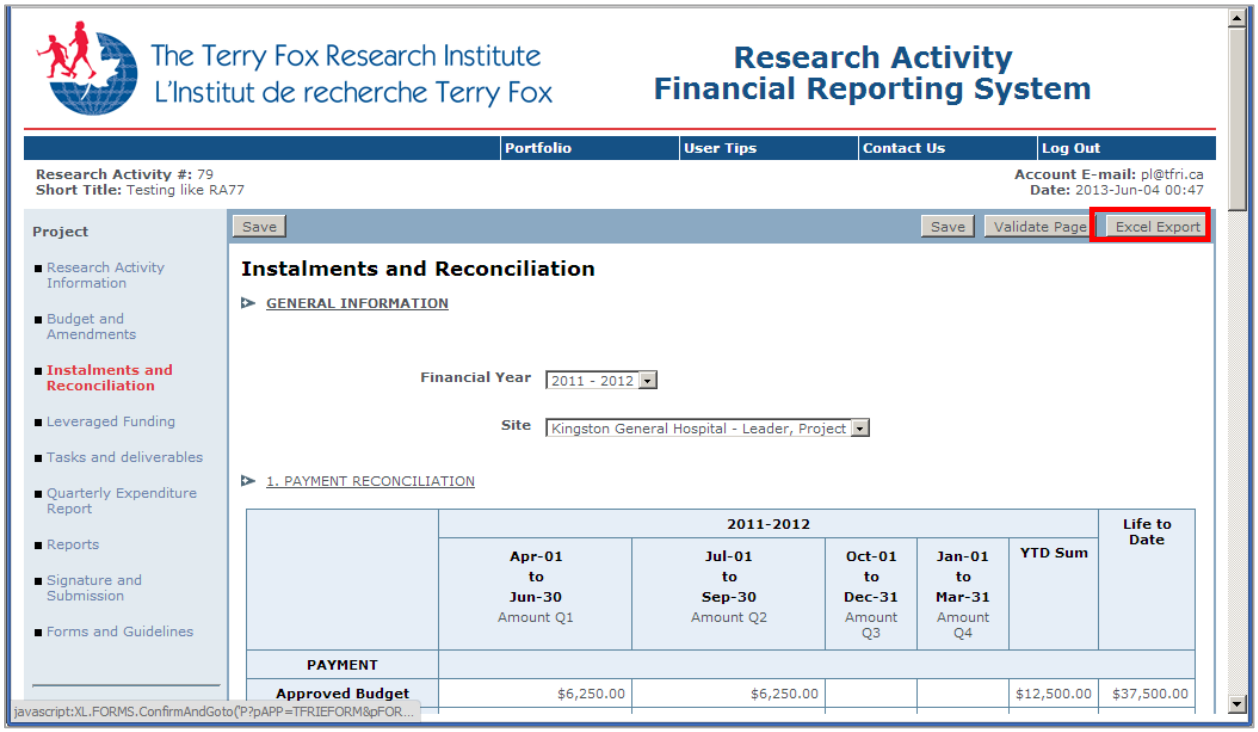
Figure 80: Reconciliation Diagnostic


Research Activity Financial R
Research Activity Financial R
Research Activity Financial R
https://tfri.evision.ca/tfri_rafrs/startup
2. RECONCILIATION DIAGNOSTIC
2011-2012
Apr-01 to Jun-30 Amount Q1
Jul-01 to Sep-30 Amount Q2
Oct-01 to Dec-31 Amount Q3
Jan-01 to Mar-31 Amount Q4
YTD Sum
RA Quarterly Expenditure Report
$0.00
$0.00
Expenditure Total
$0.00
$0.00
Cash Variance*
$12,500.00
*Positive = unspent funds at Site / Negative = overdrawn funds at Site account
The Variance calculation is based on Payments received less Expenditures.
The submitted financial data for this quarter is for interim review pending approval by TFRI.

10.3. View Reconciliation Summary

At any time during the reconciliation process, the information on the page can be exported to Excel. Click the **Excel Export** button located at the top and bottom of the page.

Figure 81: Export Reconciliation Summary



PART IV: ANNUAL REPORTING & MAINTENANCE ACTIVITIES

This section covers RA reporting and maintenance activities to be performed on an annual basis. These activities include: Annual Sign-Off, Budget Amendments and updating the Tasks and Deliverables file. In addition, changing Project Leader, Project Manager and Financial Representatives is explained.

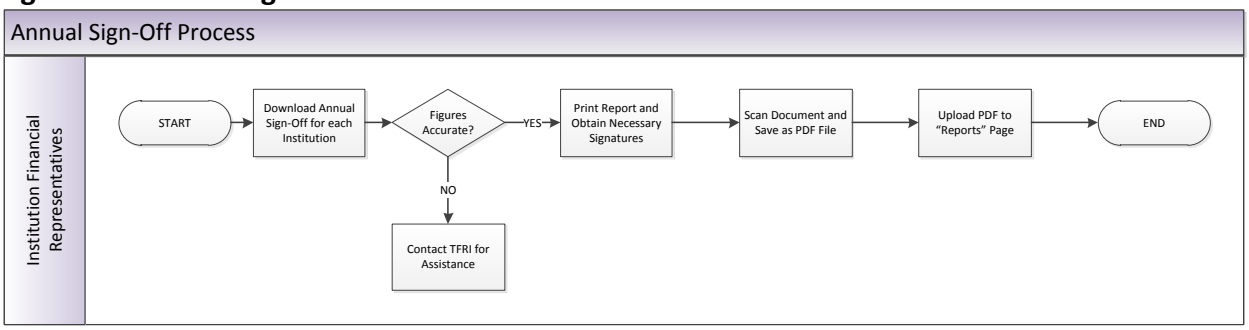
11. Annual Sign-Off

The Annual Sign-Off is an accountability declaration that is automatically generated by the RA-FRS. It is required to be completed for each Institution/PI of a Research Activity. If a particular PI has budget within more than one project in a RA, the Annual Sign-Off combines all expenditures for the fiscal year for that PI. The Financial Representative for each Site/PI must download the form after the QER for the period ending March 31 has been submitted. Only then will the data be accurate. The PI and an authorized financial representative from the Institution must review and sign this declaration. Once signed, it is scanned and uploaded back to the system. The Annual Sign-Off is due 60 days past March 31, except for when an RA is finished, where it is due 60 days past the end of the final quarter.

The report consists of three pages: the first page states the terms with which the signatories agree; the second page provides a high-level summary of site financial status; the third page lists Capital Equipment and IT purchases.

The process for preparing and submitting an Annual Sign-Off is outlined in the flowchart below. A detailed description of the steps follows.

Figure 82: Annual Sign-Off Process

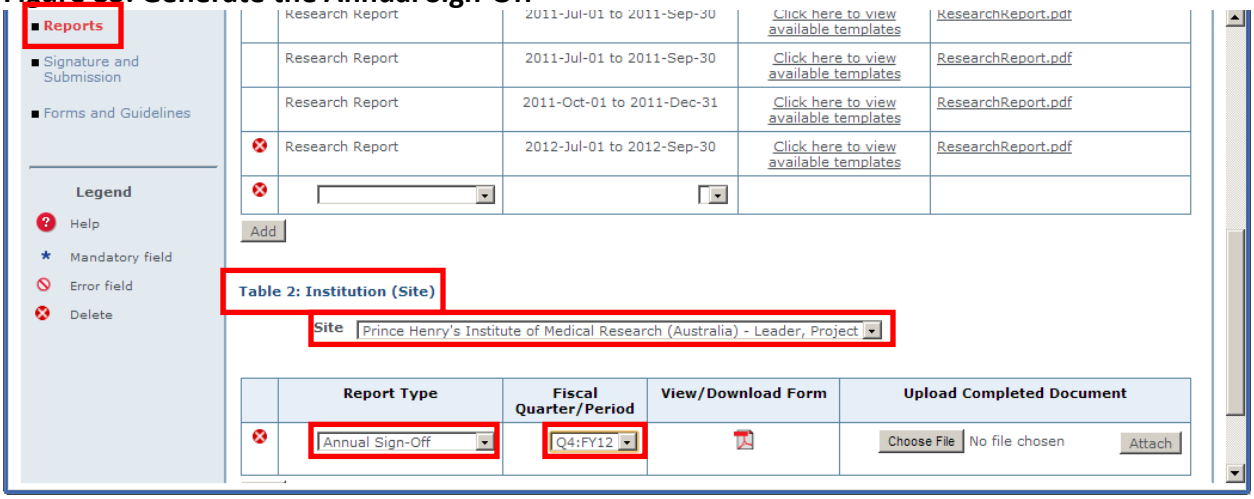


11.1. Generate the Annual Sign-Off

The system is set up to provide a customized Annual Sign-Off for each Site/PI of the RA. These instructions are for financial representatives but it should be noted, the Project Manager/Project Leader also have permissions for Annual Sign-Off generation. Click the

Reports option on the left menu. Under **Table 2: Institution (Site)** there is a drop-down list. The Project Manager/Project Leader will see all Site/PIs on this list however the financial representatives will only see their assigned Site/PIs. Under **Report Type**, select **Annual Sign-Off**. Next, select the appropriate **Fiscal Quarter/Period** from the drop-down list.

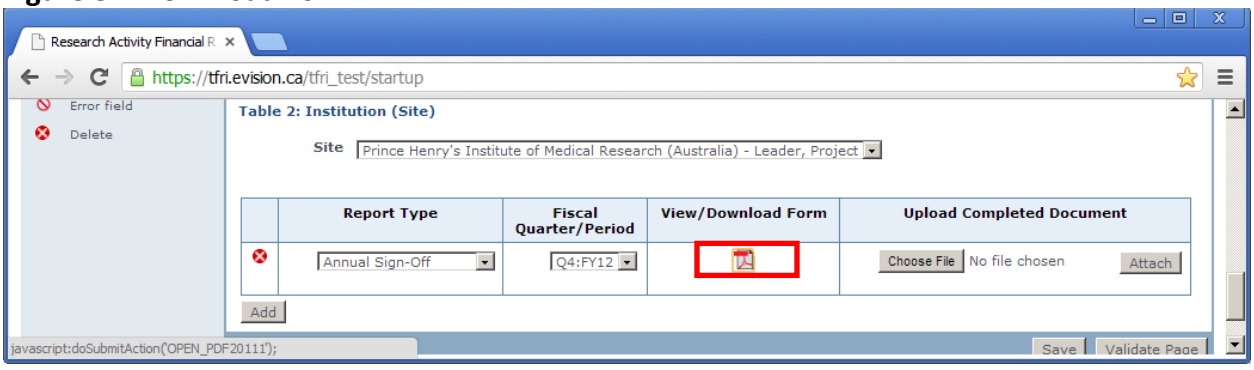
Figure 83: Generate the Annual Sign-Off



Upon selecting the Fiscal Quarter/Period, the screen will refresh and a PDF icon will appear in the **View/Download Form** column. Click on the icon to open the report.

Note that you will be able to download the form for any given fiscal quarter/period, however it will not be accurate until the QER for Q4 of the fiscal year has been submitted. Check with the Project Manager/Project Leader of the project to see if the QER has been submitted before downloading the form.

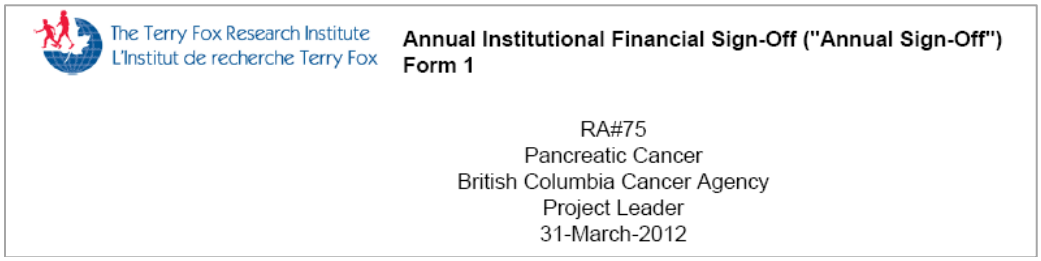
Figure 84: Download Form



Trouble downloading the Annual Sign-Off? Some users get logged out of the RA-FRS when trying to download the Annual Sign-Off on the Reports page. This is due to a high-level security parameter in Internet Explorer 8. For information on how to adjust your browser security settings see **Section 1.2.1.2** of this document.

The report header is automatically populated with the number and title of the RA, Site Name, PI Name and the date ending the reporting period.

Figure 85: Annual Sign-Off Header



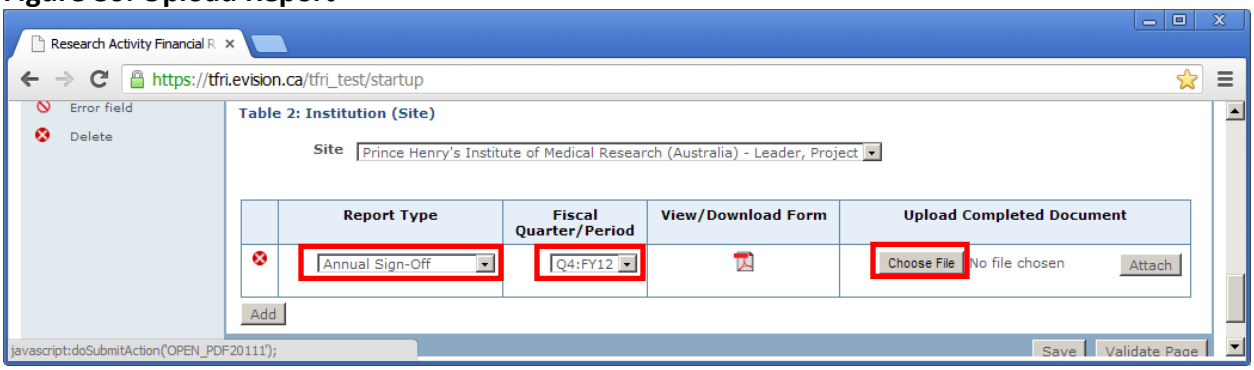
11.2. Complete the Report

Print the report and confirm that the figures are accurate. Have all the parties named on the first page authorize the form. TFRI requires that an authorized financial representative of the Institution receiving the funds attests to the accuracy of the financial statement. The authorized representative does not have to be the person who entered the data. Once the signatures have been obtained, scan the document and save as a PDF file.

11.3. Upload the Report

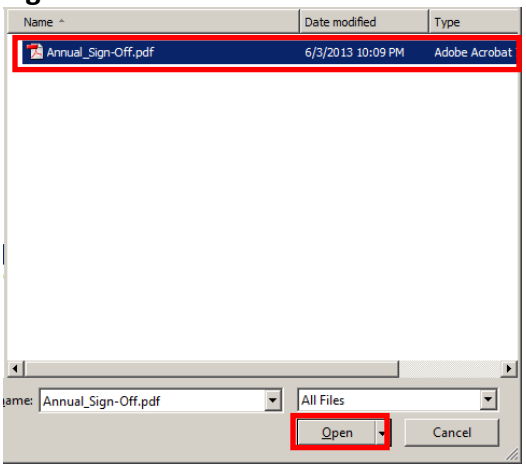
To upload the Annual Sign-Off, select the appropriate Site/PI, Report Type and Fiscal Quarter/Period from the drop-down lists on the Reports page. The **Choose File** and **Attach** buttons will appear in the **Upload Completed Document** section of the page.

Figure 86: Upload Report



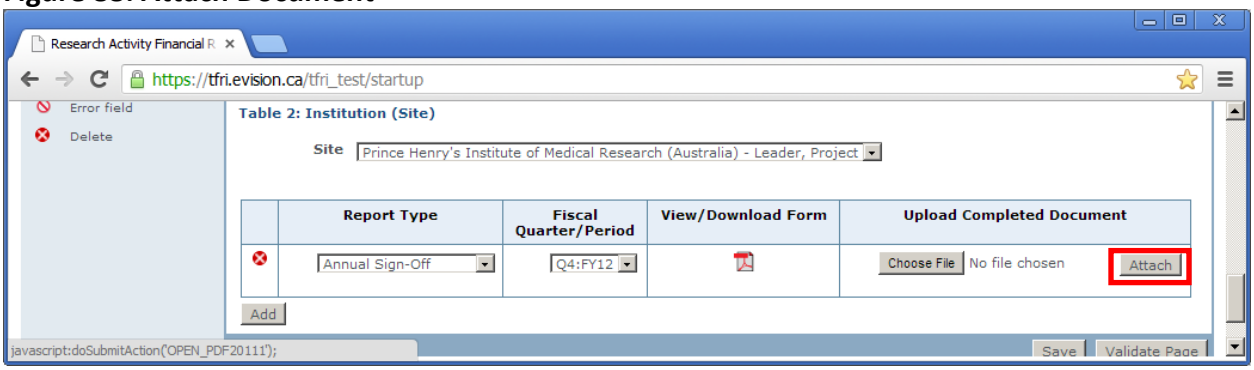
Click **Choose File** and navigate to where the file is saved on your computer and select it. Click **Open**.

Figure 87: Select File



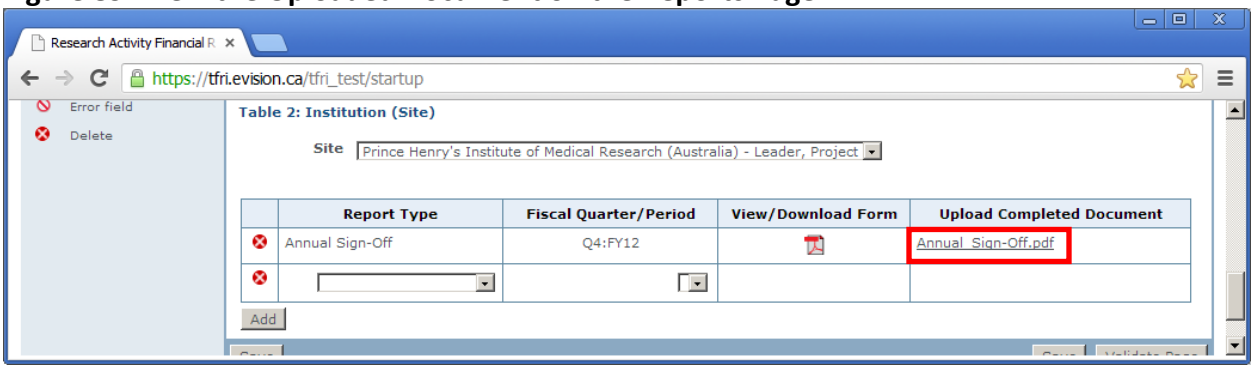
After the file is selected, click **Attach**.

Figure 88: Attach Document



In the table displayed on the page, the file will now be accessible through a link.

Figure 89: View the Uploaded Document on the Reports Page

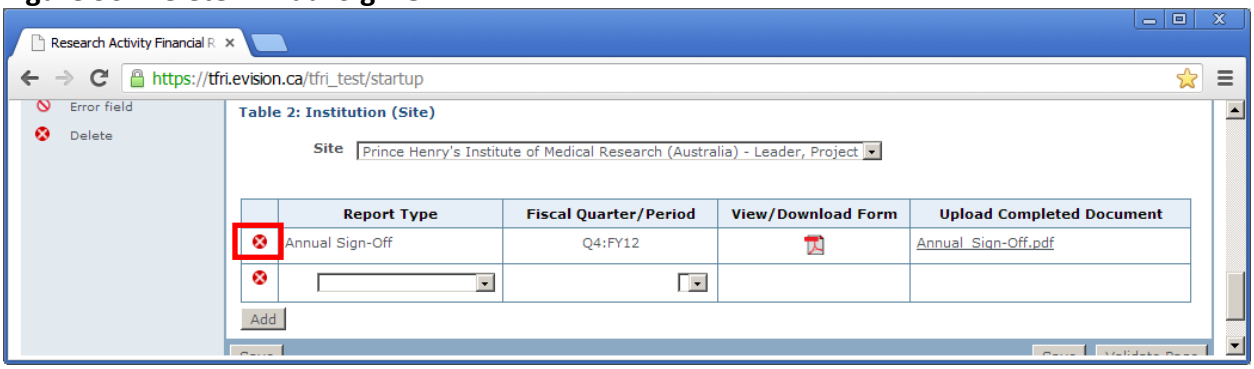


Financial representatives can view the uploaded Annual Sign-Off for each fiscal year on the Reports page. Project Managers/Project Leaders can view it on the Reports page as well as the Signature and Submission page. TFRI will only approve the QER for the last quarter of the fiscal year after all Annual Sign-Offs have been uploaded.

11.4. Delete a Report

A newly uploaded Annual Sign-Off may be deleted up until the time that the QER is approved. To delete an Annual Sign-Off file, press the "x" button corresponding with the file to be deleted.

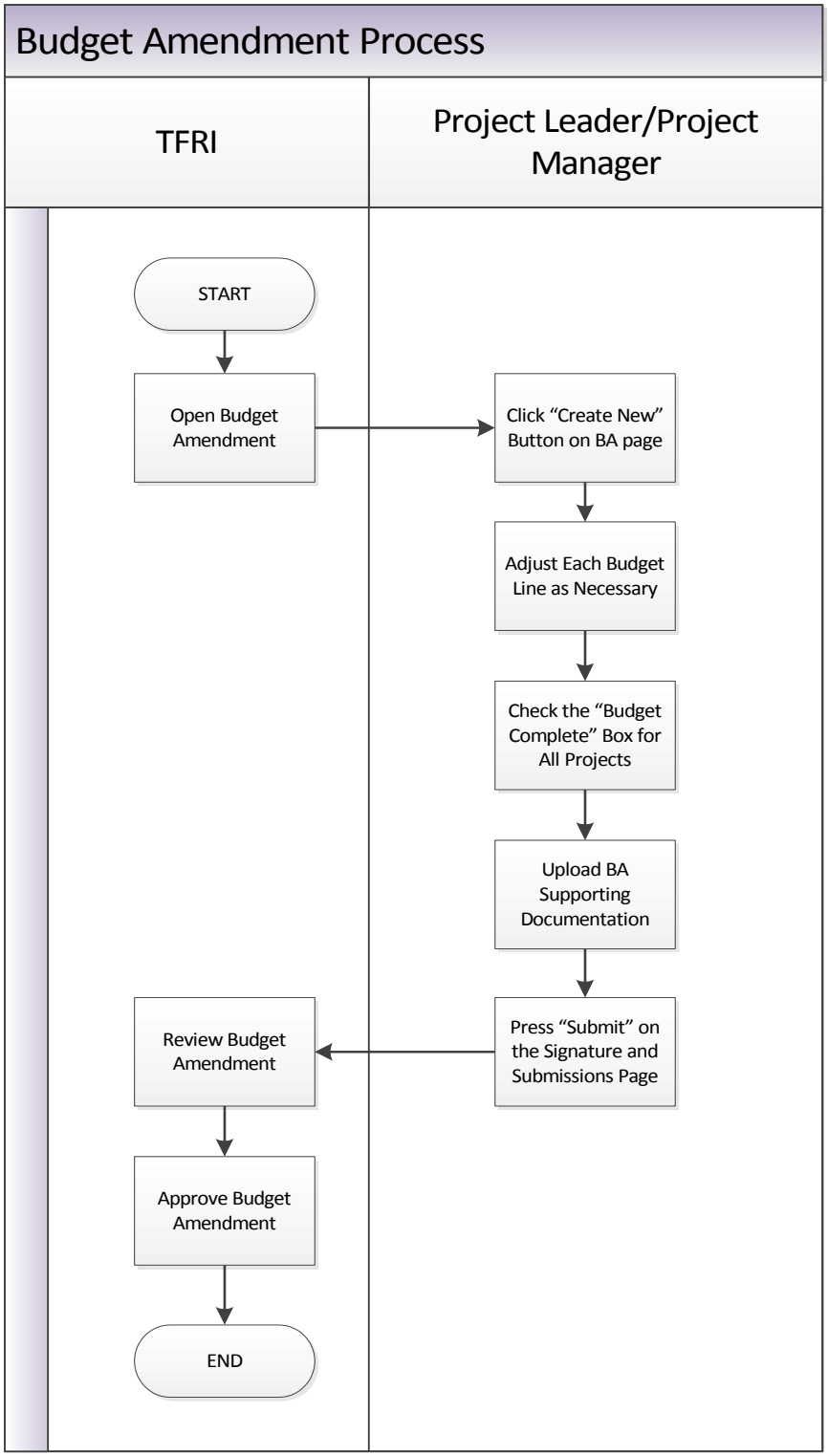
Figure 90: Delete Annual Sign-Off



12. Budget Amendments

A Budget Amendment (BA) may be opened once a QER has been completed, submitted and approved. The process for opening a BA is outlined below.

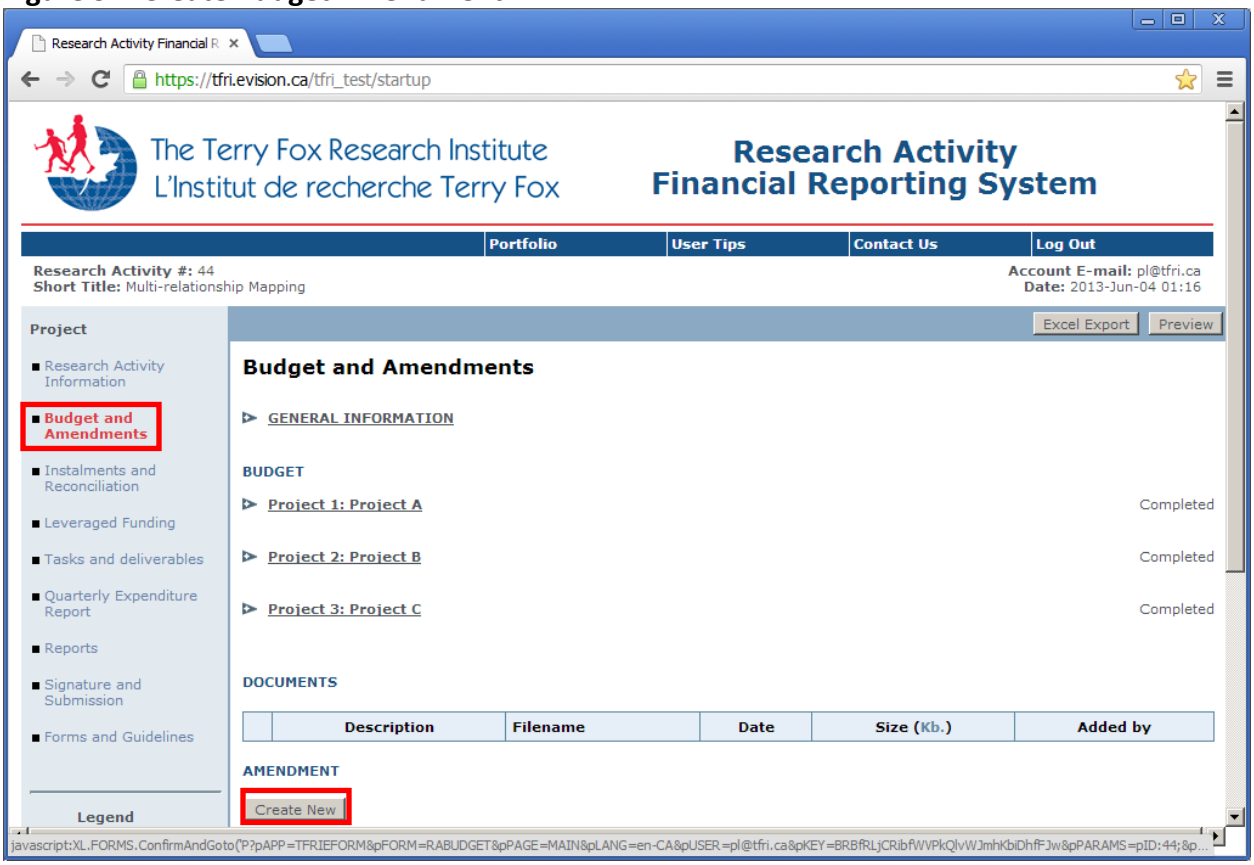
Figure 91: Budget Amendment Process



12.1. Request a Budget Amendment.

When it is evident a BA is required, please discuss with TFRI. If TFRI agrees to proceed with a budget amendment, TFRI will open an option in the system for Budget Amendment. Click the **Budget and Amendments** page on the left menu. Click on the **Create New** button located on the page.

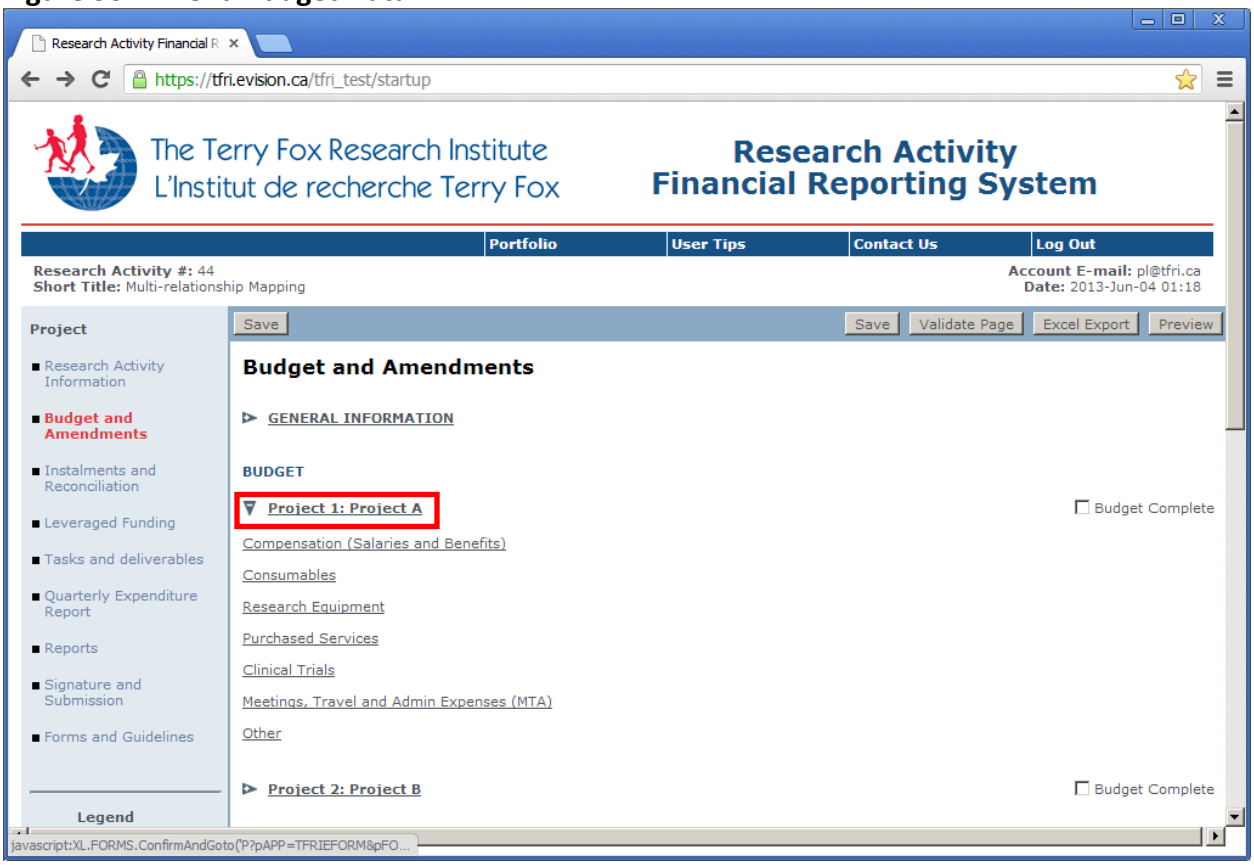
Figure 92: Create Budget Amendment



12.2. Amend Project Budgets

On the Budget and Amendments page, select the first Project to be amended. The page will refresh and the expense categories will appear below the project name. Click on the first expense category Compensation (Salaries and Benefits) and adjust each line by changing the dollar amount and corresponding number of FTEs.

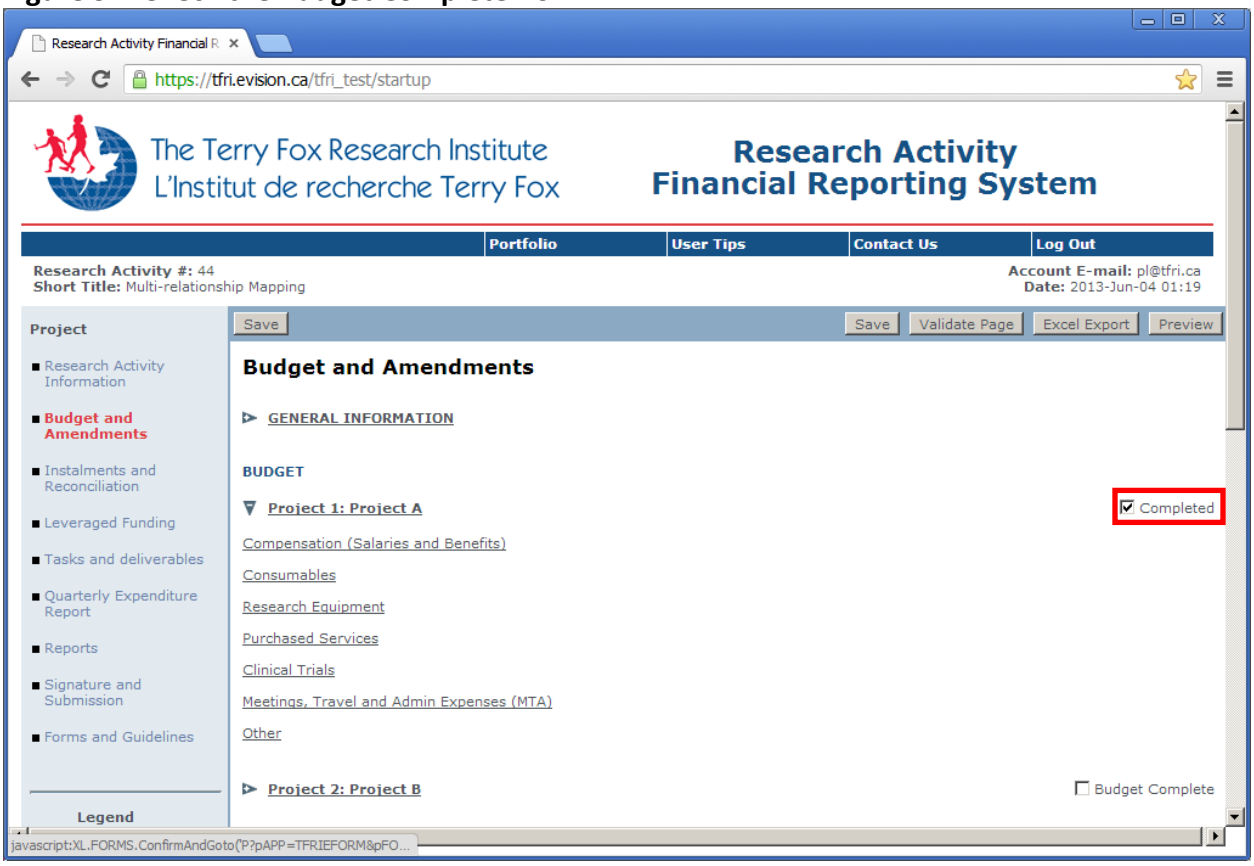
Figure 93: Amend Budget Data



Once the necessary changes have been made to the Compensation category, click **Save**. The lines that have been completed will turn green.

Repeat this process with the remaining expense categories for each project if amendments are needed. When all necessary changes have been made, click on the **Budget Complete** checkbox. This checkbox must be completed for all projects regardless of whether it has been amended or not.

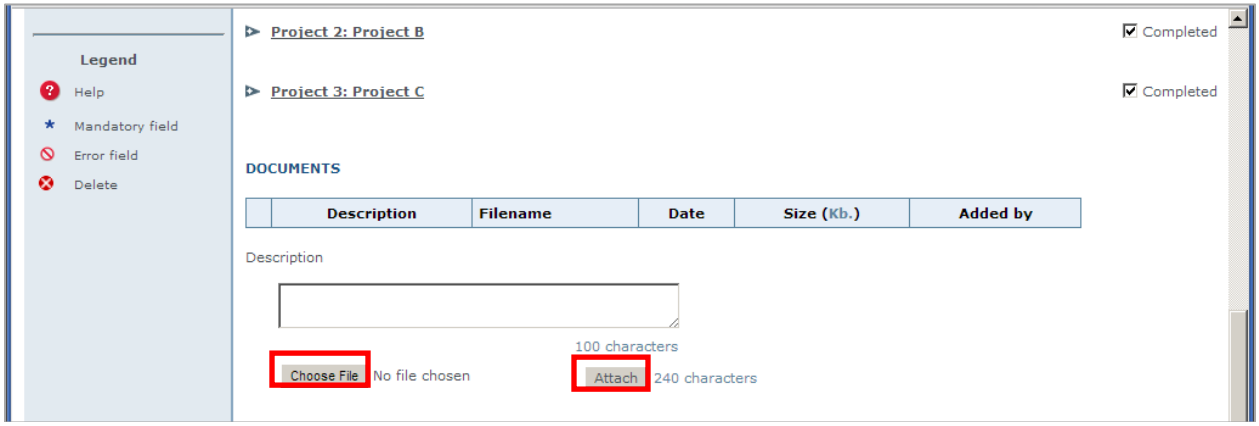
Figure 94: Check the Budget Complete Box



12.3. Attach Supporting Documents

Documentation supporting the Budget Amendment may be attached using the upload feature on the Budget and Amendments page. Select **Choose File** and then **Attach** after you have selected your document.

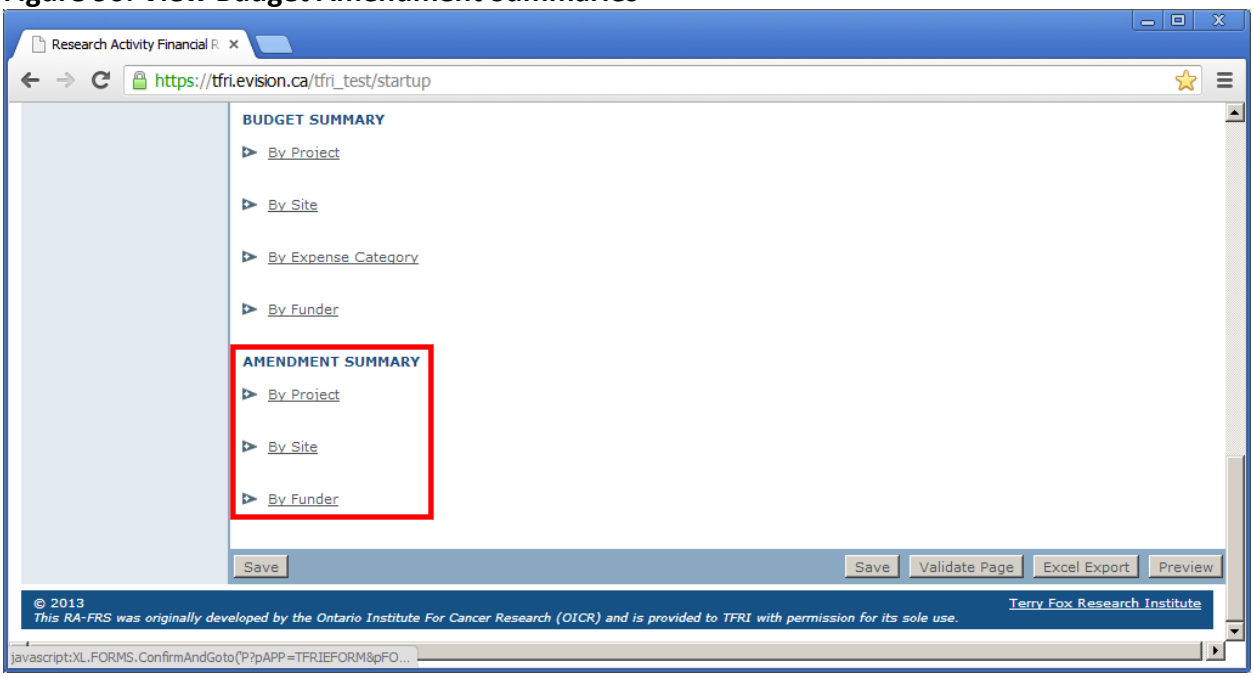
Figure 95: Attach Supporting Documents



12.4. View Budget Amendment Summaries

There are different ways to view the budget amendment. Scroll down to the bottom of the **Budget and Amendments** page to see the **Amendment Summary** list. Click on any of these links to see the budget displayed in a variety of ways. In addition, at the top and bottom at right of the screen, there are buttons for **Excel Export** and **Preview** that are helpful when viewing the budget. Note that the system does not support the printing of reports while in **Preview** mode. To print a summary, click the **Excel Export** button and print the file through Excel after formatting.

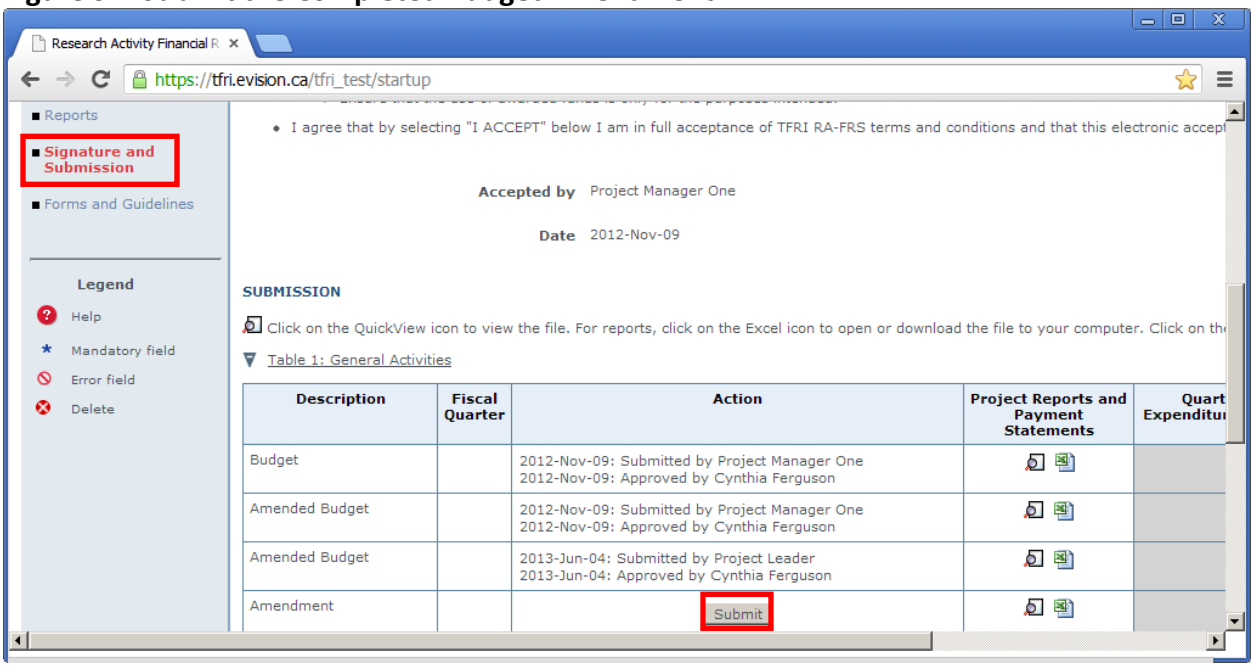
Figure 96: View Budget Amendment Summaries



12.5. Submit Budget Amendment

To complete the Budget Amendment process, click the **Submit** button on the **Signature and Submission** page. TFRI will be notified of your submission.

Figure 97: Submit the Completed Budget Amendment


Research Activity Financial R
https://tfri.evision.ca/tfri_test/startup
Reports
Signature and Submission
Forms and Guidelines
Legend
Help
Mandatory field
Error field
Delete
I agree that by selecting "I ACCEPT" below I am in full acceptance of TFRI RA-FRS terms and conditions and that this electronic accep
Accepted by Project Manager One
Date 2012-Nov-09
SUBMISSION
Click on the QuickView icon to view the file. For reports, click on the Excel icon to open or download the file to your computer. Click on th
Table 1: General Activities
Description
Fiscal Quarter
Action
Project Reports and Payment Statements
Quart Expenditu
Budget
2012-Nov-09: Submitted by Project Manager One
2012-Nov-09: Approved by Cynthia Ferguson
Amended Budget
2012-Nov-09: Submitted by Project Manager One
2012-Nov-09: Approved by Cynthia Ferguson
Amended Budget
2013-Jun-04: Submitted by Project Leader
2013-Jun-04: Approved by Cynthia Ferguson
Amendment
Submit

TFRI will review and approve the submission. If changes are required, TFRI will discuss with the Project Manager/Project Leader and "unsubmit" the Budget Amendment.

13. Update Tasks and Deliverables

Following a budget amendment and annually, it is necessary to upload the Tasks and Deliverables file. This is reviewed by TFRI and may be used to amend site agreements. To upload Tasks and Deliverables, see **Section 6.2**.

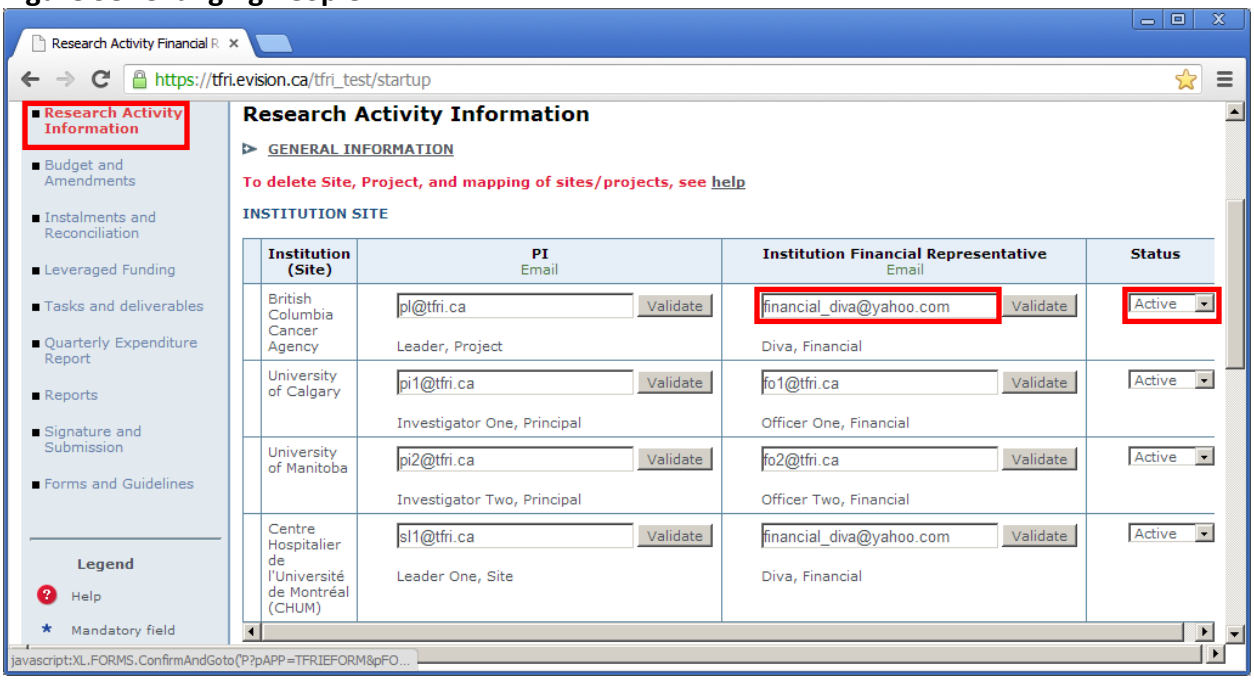
14. Change RA Project Leader, Project Manager, Financial Representatives or PIs

It may be necessary to change either the Project Leader, Project Manager, a Financial Representative and/or a PI in an RA after it has been ongoing. To change the Project Leader or Project Manager, contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca. It must be done using an Administrative account. To change the Financial Representative, click the **Research Activity Information** page on the left menu. Type over the email address of the Financial

Representative that will be retired, and click **Validate** to verify the new Financial Representative is in the system. After validation, click **Save**. It is possible to overwrite a PI email address but caution should be exercised since budgets within projects are linked to the Site/PI. If a PI will no longer participate in the RA, set the status to **Inactive** instead so past budget/expenses will contain the correct PI name. If a new PI from that Site will be joining, set up a new Site/PI row with the instructions from **Section 3.7**.

Note that once a Project Leader, Project Manager or Financial Representative's email address is removed from the RA Information, they will no longer have system access.

Figure 98: Changing People



PART V: FREQUENTLY ASKED QUESTIONS

This section lists a selection of commonly asked questions and their answers. If your question is not listed below, feel free to contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.

Q1: When I try and download a file or template from the system I get sent back to the login page. What can I do?

A1: This issue arises with Internet Explorer 8. There is a high level security parameter that blocks automatic prompting for file download. This feature doesn't exist in higher versions of Internet Explorer or other web browsers. This issue can be resolved by adjusting your browser's security settings. See **Section 1.2.1.2** of this document for detailed instructions.

Q2: When I try and add a PI or other user to my RA the system does not validate their email address.

A2: This occurs when the user has not yet created an account with the RA-FRS. This can also happen if the email address you are entering into the system is not the same as the address the person registered with.

Q3: I'm having trouble printing the summary reports in Preview mode.

A3: Printing is not supported in Preview mode. To print reports, use the **Excel Export** button located at the bottom of most pages, then format and print through Excel.

Q4: Can I request that I stop receiving system-generated email notifications?

A4: Email notifications may be suppressed on an account-level basis. To request this service, contact TFRI at 604-675-8222 or via email at FRShelp@tfri.ca.